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Restaurant Business

FEBRUARY 1, 1980

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Church's winning team

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plus
RGI
update

Back to Bases

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A regional analysis

by Malcolm M. Knapp

Foodservice sales are presented at the dawn of a new decade to compare the benchmark Census of Retail Trade years of 1972 and 1977 and to present the outlook for 1980. These data are a continuation of the material presented in the Restaurant Growth Index in the September 15th, 1979 issue of *Restaurant Business*.

The very recent publication of the 1977 Census of Retail Trade reports affords an opportunity to compare our estimates with the results of the census and to recalibrate our projections. The examination is for eating places as the merchandise line figures for the remainder of the analysis will not be out until April.

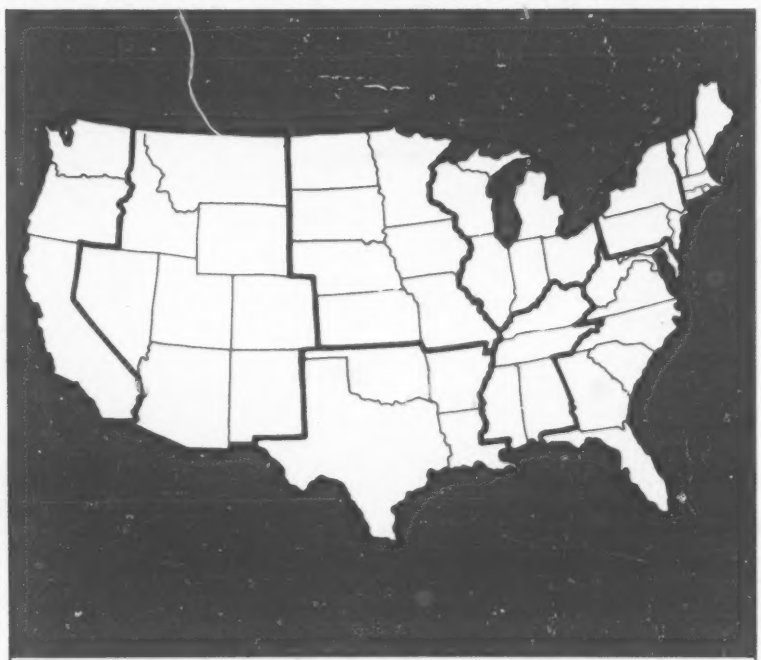
On the overall sales of eating places, our estimates are 2.84 percent higher than census in 1977. In fact, the estimates we made are *nearly* on target with respect to the percent change over the five-year period because there was an overstatement of sales between 2.5 percent and 3.0 percent due to about 60 percent of the respondents to the census including sales tax in their sales figures in the 1972 census. This did not happen in 1977. We were only 7.58 percent high for restaurants and 9.38 percent low for limited-menu restaurants (fast food).

There was some shifting of sales between these two categories due to more stringent definitions of what a full-menu restaurant is (must have waiter/waitress service taking the

FOODSERVICE INDUSTRY SALES OVERVIEW

Foodservice Sales	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound % annual growth 1972/1977	1977/1980
TOTAL MARKET	50,608,120	85,393,062	112,170,215	11.03	9.52
Commercial/contract	41,739,870	71,700,081	94,659,979	11.43	9.70
Institutional/internal	8,257,498	13,121,523	16,855,239	9.71	8.71
Military	610,752	571,458	654,997	-1.32	4.65
MAJOR MARKET SEGMENTS					
Separate Eating & Drinking Places	32,069,906	55,985,408	73,837,952	11.97	9.67
Hotel Motel Market	2,999,204	4,816,698	6,509,874	9.94	10.56
The Transportation Market	806,453	1,309,690	1,937,510	10.18	13.94
The Leisure Market	953,418	1,794,278	2,504,566	13.48	11.76
The Retail Market	1,942,404	2,887,733	3,678,226	8.25	8.40
The Business Industrial Market	3,136,655	5,293,978	6,887,854	11.04	9.17
The Student Market	3,293,094	4,806,762	6,020,914	7.86	7.80
The Health Care Market	4,274,843	7,415,486	9,664,128	10.63	9.23

SEPARATE EATING AND DRINKING PLACES



UNITED STATES	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	1977/1980
Restaurants	15,961,207	27,287,568	34,865,877	11.32%	8.51%
Cafeterias	1,522,092	1,765,628	2,130,178	3.01	6.46
Limited menu restaurants	8,264,422	18,899,368	27,376,241	17.99	13.15
Social Caterers	643,155	692,536	772,202	1.49	3.70
Ice cream, frozen custard stands	345,623	919,030	1,306,160	21.60	12.43
Bars and taverns	5,333,407	6,421,258	7,387,294	3.78	4.78
	32,069,906	55,985,408	73,837,952	11.79	9.67

order and delivering the food while the patron is seated).

Social caterers did not grow as much as expected and a portion of the sales which they might have enjoyed were gained by restaurants being more aggressive in seeking and obtaining catering business.

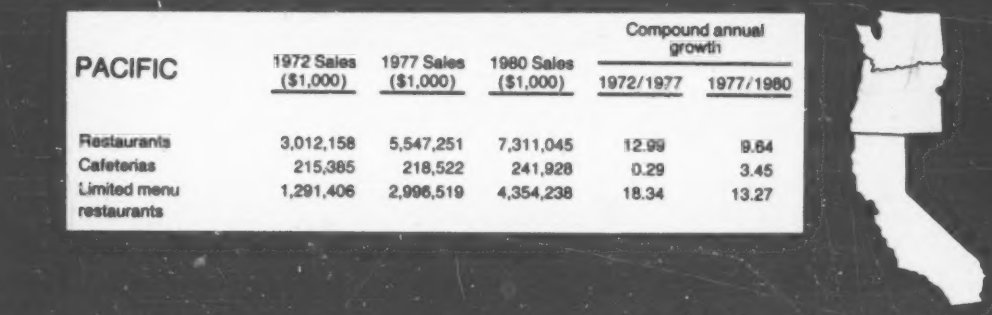
Cafeterias also grew by much less (35.5 percent less than estimated) due to negative growth in sales in three census regions and negative growth in the number of stores in six of nine census regions.

The most dramatic growth took place in ice cream, frozen custard stands which was 49.72 percent higher than our estimate. Part of the reason for the big difference is the inclusion in the figures of stores which were not categorized in this classification in 1972. The growth in yogurt is encompassed within this category which is another reason for the spectacular gain.

The regional analysis comparing the 1972 with the 1977 Retail Trade Census for the meals, snacks and alcoholic beverage sales of full-menu restaurants, cafeterias, and limited-menu restaurants is a fascinating peek into the regional variations not only in growth but in what the relative growth rates are for the different segments.

For example, The West South Central region had a decline in the number of establishments in both full-menu restaurants and cafeterias but had the highest percent gain,

PACIFIC	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	3,012,158	5,547,251	7,311,045	12.99	9.64
Cafeterias	215,385	218,522	241,928	0.29	3.45
Limited menu restaurants	1,291,406	2,996,519	4,354,238	18.34	13.27



MOUNTAIN	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	776,937	1,546,460	2,113,212	14.76%	10.97%
Cafeterias	63,168	93,317	123,259	8.12	9.72
Limited menu restaurants	376,078	927,224	1,385,119	19.78	14.31

WEST NORTH CENTRAL	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	1,122,952	1,997,283	2,590,364	12.21%	9.05%
Cafeterias	113,432	130,577	156,843	2.85	6.30
Limited menu restaurants	576,306	1,407,935	2,094,413	19.56	14.15

42.07 percent, in number of limited-menu restaurants. Despite the decline in establishment counts in full-menu restaurants and cafeterias, the West South Central region had increases of 88.21 percent in sales for full-menu restaurants (second highest gain by region for this industry segment) and 58.68 percent in cafeteria sales (the highest gain). It also had the highest gain, 174.74 percent, in the limited-menu restaurant segment. These data point to the importance of store size or location in generating sales per unit. It is too easy to misread the economic health of an industry or region by looking only at the changes in the number of stores.

The New England and Middle Atlantic regions had basically the lowest sales gains in all three segments. The East North Central region was the third worst in performance. Despite this, The East North Central region is the largest dollar volume region for limited-menu restaurants.

The Pacific region, which usually commands a large share of mind in originating trends, has a somewhat lower rate of growth than one would intuitively expect. It is third in growth in full-menu restaurant sales but first in total dollars. It is sixth in cafeteria sales growth and fourth in sales size. And, it is sixth in limited-menu growth and third in sales size.

Reinforcing the earlier point about the variability of the numbers of establishments in predicting sales, the Pacific region, which ranks third in the number of restaurants, has 11.6 percent fewer establishments than the East North Central region which has 6.99 percent fewer sales than the Pacific region.

In restaurant sales, the once dominant Middle Atlantic region is now eclipsed substantially by the East North Central and Pacific regions.

In the cafeteria group, the East North Central region, which was number one in 1972, is now number three, according to 1977 census

In restaurant sales, the once dominant Middle Atlantic region is now eclipsed substantially by the East North Central and Pacific regions.

WEST SOUTH CENTRAL

	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	1,100,265	2,070,590	2,756,521	13.48%	10.01%
Cafeterias	227,465	360,953	489,261	9.67	10.67
Limited menu restaurants	778,652	2,138,975	3,358,782	22.40	16.23

EAST NORTH CENTRAL

	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	2,976,258	5,159,641	6,612,064	11.63%	8.62%
Cafeterias	306,134	253,951	261,910	-3.67	1.03
Limited menu restaurants	1,700,169	3,703,638	5,228,062	16.85	12.18

Illinois, Indiana, Michigan, Ohio and Wisconsin

EAST SOUTH CENTRAL

	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	581,328	1,040,693	1,353,628	12.35%	9.16%
Cafeterias	90,908	119,450	148,848	5.61	7.61
Limited menu restaurants	454,798	1,162,852	1,766,409	20.66	14.95

Alabama, Kentucky, Mississippi, and Tennessee

data, with the South Atlantic region taking over the number one spot and West South Central moving into the number two position.

For the limited-menu restaurant segment, the East North Central region retains its number one spot. This segment is unique in that the first six regions in sales in 1972 remained in the same relative positions in 1977.

In terms of contribution to the overall sales gain of $22,827,651,000 in eating place sales from 1972 to 1977, restaurants increased $11,326,361,000 for 49.62 percent of the total gain. Limited menu restaurants increased $10,634,966,000 or 46.59 percent of the total gain. Ice cream, frozen custard stands gained $573,407,000 or 2.50 percent of total gain. Cafeterias gained $243,536,000 or 1.07 percent of total gain and social caterers increased by $49,381,000, or 0.22 percent of the total gain. This analysis disproves the notion that all sales gains are generated by limited-menu restaurants.

In 1977 there were 229,892 eating place establishments versus 203,063 in 1972 (establishments with payroll), a gain of 26,829 or 2.51 percent increase compounded each year. Restaurants grew in the number of establishments by 6,240 for a compound growth of 1.08 percent per year or 23.26 percent of the total growth. Limited-menu restaurants grew by 19,509 for a compound growth rate of 4.85 percent per year or 72.71 percent of the total growth of establishments.

Foodservice markets in 1980 will grow 9.1 percent to $112.2 billion with the commercial/contract market up 9.3 percent; the institutional/internal market up 8.0 percent and the military up 6.8 percent. Eating place sales will rise 9.9 percent with limited-menu restaurants gaining 12.4 percent and restaurants up a lackluster 8.4 percent.

The pressures of menu price increase of 9.7 percent will keep real growth for the eating places to a

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In short, 1980 will not be a good growth year, but because of various structural reasons . . . it will not be the disaster that 1979 turned out to be.

SOUTH ATLANTIC	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	2,217,827	3,852,144	4,941,504	11.68%	8.66%
Cafeterias	273,641	394,818	514,262	7.61	9.21
Limited menu restaurants	1,407,403	3,291,014	4,798,631	18.52	13.40

MIDDLE ATLANTIC	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	3,107,202	4,375,562	5,095,445	7.09%	5.21%
Cafeterias	186,690	151,152	148,045	-4.14	0.69
Limited menu restaurants	1,197,530	2,388,443	3,239,126	14.81	10.69

NEW ENGLAND	1972 Sales ($1,000)	1977 Sales ($1,000)	1980 Sales ($1,000)	Compound annual growth 1972/1977	Compound annual growth 1977/1980
Restaurants	1,066,280	1,697,944	2,092,094	9.75%	7.21%
Cafeterias	45,269	42,888	45,822	-1.07	2.23
Limited menu restaurants	482,080	882,788	1,151,461	12.86	9.26

bare minimum 0.2 percent real growth. People are looking for value and they are looking very carefully. The food-at-home prices will be moving up less rapidly than food-away-from-home and will create a price-value problem. The institutional/internal segment continues to show low or negative gains due to declining populations. Also, in 1980, employment at best will remain stable and not have the very large gains of the past few years.

In short, 1980 will not be a good growth year, but because of structural reasons such as the necessity of eating away from home, the changing age mix, working wives, and government support payments, it will not be the disaster that 1979 turned out to be.

From the 1979 data that is already in, it is clear that it was a negative growth year for separate eating places. Menu inflation for this segment was up 11.1 percent and sales were up only 9.3 percent, leaving us with sales off 1.8 percent in terms of real growth.

The main culprits were:

- The gasoline shortage and the over-reaction to it on the part of consumers which removed between 0.8 and 1.2 percent from sales;
- Menu inflation which was in double digits and which made the consumer question the price-value of eating out;
- Higher cost of fixed charges on consumer income from such areas as housing, transportation, food, and medical care which left fewer discretionary dollars; and
- The uncertainty the consumer felt about his own economic future which led him to cut back.

The commercial/contract group was up 9.0 percent in sales; the institutional/internal group was up 8.6 percent, and the military was up 4.8 percent. Overall, the foodservice industry was up 8.9 percent.

This summary was prepared by RBI Research and Malcolm Knapp, president of Malcolm M. Knapp, Inc., New York. The 1972, 1977 and 1980 sales data used in this major market segment report were prepared by Mr. Knapp under contract with the National Restaurant Association. Eating place sales data for the nine majo.' census regions were prepared by Mr. Knapp specifically for ***Restaurant Business*** *Magazine.*

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Franchising: How fertile its future?

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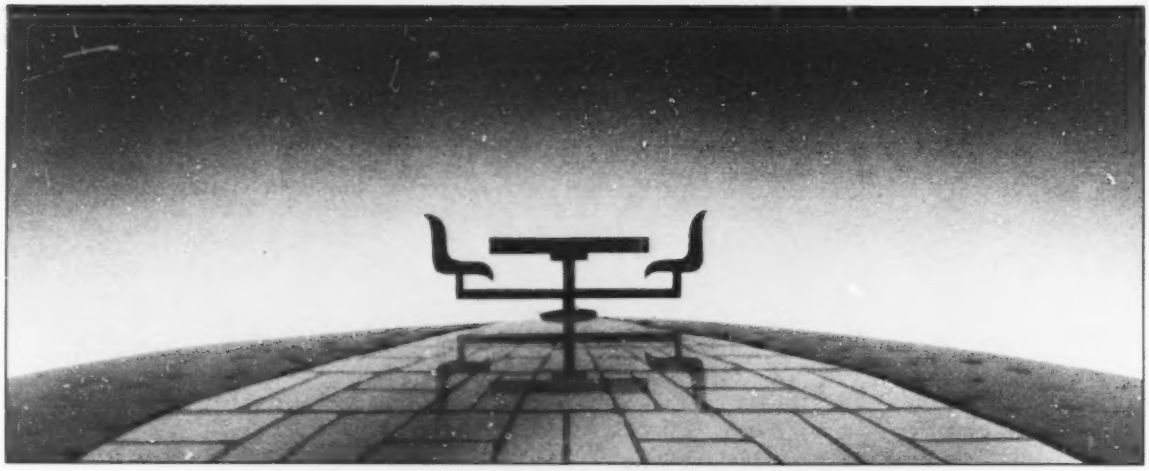

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Reprints of the 12th Annual Restaurant Growth Index are now available for $2 per copy. Contact the editors of Restaurant Business at 633 Third Avenue, New York, N.Y., 10017.

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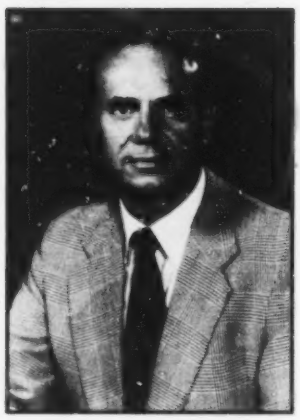
Restaurant franchising in the economy



"Franchising in the Economy, 1978-1980," is an updated study about franchising in the United States which is issued annually by the Department of Commerce. Each March since 1973, Restaurant Business has published excerpts of the survey results which pertain to franchised restaurants. The report and tables were prepared by Andrew Kostecka of the Service Industries, Division, Bureau of Industrial Economics, which is under the supervision of Wray O. Candilis, director.

Franchising has achieved a phenomenal growth rate over the past several years and continues to offer tremendous opportunities to individuals and companies seeking wider distribution for their products and services.

Franchising has become highly attractive to many large corporations and conglomerates, here and abroad, as a means of diversification in such fields as fast food, real estate, and hotels and motels.

In addition, franchisees are enjoying a competitive edge over the small business entrepreneurs by the use of tradenames, marketing expertise, acquisition of a distinctive business appearance, standarization of products and services, training, and advertising support from the parent organization.

This major force in the U.S. economy is not merely another industry. It is a way of marketing a product or service, and is being successfully adopted by an everwidening variety of industries and businesses. The remarkable thing about franchising is that it is probably the only form of business entity that, by its very nature, contributes to the creation of new business units.

Franchise sales of goods and services by all franchising companies are expected to reach $338 billion in 1980, an increase of 18 percent over the sales reported for 1978, while the number of establishments will be approximately 488,000 in 1980, up from 452,000.

Employment in franchising, including part-time workers and working proprietors, is estimated at 4,496,250 in 1978, a gain of over 8 percent from the 1977 level of 4,150,759.

The movement of U.S. franchisors seeking markets outside the United States is accelerating. Many large franchisors have already spread throughout many foreign countries, but the big surge into foreign markets in the next few years will be by smaller and medium sized franchisors, marketing a variety of services and products.

For the past 10 years, numerous acquisitions in the franchising field by mostly non franchised corporations have taken place. Today, this trend is still continuing unabated, with foreign corporations entering the scene in greater numbers, especially in areas such as real estate, restaurants, and hotels and motels.

Canada, because of its proximity and similar customs, has been in the forefront of foreign franchise expansion in the United States, with Japan, and some European countries following close behind.

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Many franchise operators have become more customer oriented and are offering amenities such as waiter/waitress or drive-in service.

TOP 25 FRANCHISE RESTAURANT SYSTEMS

Growth in system-wide sales, 1974-1979 (Sales in millions of dollars)

Franchise System	1974	1978	1979	'74-'79 % Change	'78-'79 % Change
McDonald's	$1,943.	$4,575.	$5,385.	177%	17.7%
Kentucky Fried Chicken**	925.5	1,393.4	1,669.	80	19.8
Burger King**	467.	1,168.	1,463.	213	25.3
Wendy's	24.2	783.	1,000.*	4,032	27.8
International Dairy Queen**	590.	823.2	926.	57	12.5
Pizza Hut	232.	702.	829.	257	18.1
Big Boy	484.*	660.*	750.*	55	13.6
Hardee's**	280.	564.6	750.	168	32.8
Arby's	120.	353.	430.	258	21.8
Ho Jo's	300.*	425.*	425.*	42	0.0
Ponderosa**	183.	328.5	406.9	122	23.9
Church's	126.9	345.	405.7*	220	17.6
Bonanza	190.	346.	378.	99	9.2
Tastee Freez**	267.9*	353.8*	350.*	31	(1.1)
Long John Silver's**	45.5	283.4	342.	652	20.7
Sonic Drive-Ins**	52.1	291.7	336.	545	15.2
Burger Chef**	250.	301.	335.	34	11.3
Taco Bell**	71.1*	212.*	320.*	350	50.9
Western Sizzlin**	100.	217.3	278.1	178	28.0
Dunkin' Donuts	163.3	249.4	283.8	74	14.0
A & W	174.4	247.5	255.	46	3.0
Arthur Treacher's	48.3	191.5	226.3	369	18.2
Sizzler**	85.5	181.8	225.9	164	24.3
Perkins Cake n Steak	75.*	200.*	223.*	197	11.5
Pizza Inn	58.6	165.8	189.*	223	14.0

TOP 25 FRANCHISE RESTAURANT SYSTEMS

Growth in number of units, 1974-1979

Franchise System	1974	1978	1979	'74-'79 % Change	'78-'79 % Change
McDonald's	3,232	5,185	5,747	78%	10.8%
Kentucky Fried Chicken**	4,627	5,355	5,444	18	1.7
Burger King**	1,199	2,153	2,439	103	13.3
Wendy's	93	1,407	1,818	1,855	29.2
International Dairy Queen**	4,504	820	4,860	8	0.8
Pizza Hut	1,668	3,541	3,846	131	8.6
Big Boy	881	1,041	1,100	25	5.7
Hardee's**	924	1,125	1,231	33	9.4
Arby's	439	818	928	111	13.4
Ho Jo's	922	882	867	(6)	(1.7)
Ponderosa**	389	588	636	63	8.2
Church's	565	970	1,125	99	16.0
Bonanza	550	700	675	23	(3.6)
Tastee Freez**	2,215	2,022	2,000*	(10)	(1.1)
Long John Silver's**	208	1,001	1,007	384	0.6
Sonic Drive-Ins**	220	1,061	1,182	437	11.4
Burger Chef**	950	853	831	(13)	(2.6)
Taco Bell**	562	877	1,100	96	25.4
Western Sizzlin**	140	319	400	186	25.4
Dunkin' Donuts	780	956	1,007	29	5.3
A & W	1,899	1,500	1,306	(31)	(12.9)
Arthur Treacher's	250	730	777	211	6.4
Sizzler**	256	352	402	57	14.2
Perkins Cake n Steak	183	342	400*	119	17.0
Pizza Inn	336	743	760	126	2.3

Includes U.S. and foreign sales and units.

Source: Restaurant Business

** Estimated.*

***Fiscal year-end figures (remainder are calendar year-end figures).*

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Circle No. 78➔

Of major importance in the 1980's will be the issue of exclusive franchise territorial agreements-how much they can shield a franchisee from competition.

Franchising is probably the only form of business that creates more benefits for the importing country than for the exporting country, establishing local business units and providing jobs and income for the local population.

A persistent trend in the relationship between franchisors and franchisees is the formation of franchisee advisory councils which are usually initiated by the franchisor for the purpose of learning what franchisees want and need from the franchisor in order to grow.

The International Franchise Association has recently conducted a series of seminar sessions on this subject and has published a pamphlet on "How to Organize a Franchise Advisory Council."

In the regulatory and legislative arena, the trend is towards an increased number of bills in state legislatures to regulate business opportunities which by extension will also regulate franchising.

Of major importance in the 1980's will be the issue of exclusive franchise territorial agreements, and the extent to which such agreements can shield a franchiseee from competition of fellow franchisees.

Another object of state legislative attention will be those conditions under which a franchisor may lawfully terminate or refuse to renew an agreement with a franchisee.

Franchisors are required by federal law and 16 state laws to provide disclosure-of-information statements to prospective franchisees.

At the federal level, a trade regulation rule issued by the Federal Trade Commission, requiring the use of disclosure statements in the sale of franchises became effective October 21, 1979.

In the states of Ohio and Nebraska, franchisors are exempt from

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RESTAURANT FRANCHISING
GROWTH IN SALES, 1974-1979
(SALES: $000)

Major Activity	Total Sales			Company-owned			Franchisee-owned		
	1974	1979*	% Change	1974	1979*	% Change	1974	1979*	% Change
Total	$10,350,567	$24,591,880	138%	$3,335,338	$7,816,198	134%	$7,015,229	$16,775,682	139%
Chicken	1,258,617	2,247,838	79	421,676	765,738	82	836,941	1,482,100	77
Hamburgers, Franks Roast Beef, etc.	5,879,428	12,961,887	120	1,437,901	3,038,923	111	4,441,527	9,922,964	123
Pizza	705,423	2,007,066	185	267,915	776,902	190	437,508	1,230,164	181
Mexican (Taco, etc.)	177,763	648,100	265	71,224	315,922	344	106,539	332,178	212
Seafood	152,616	667,098	337	64,862	260,633	302	87,754	406,465	363
Pancakes, Waffles	267,868	681,728	155	49,420	164,023	232	218,448	517,705	137
Steak, Full Menu	1,865,330	5,170,218	177	1,018,830	2,461,797	142	846,500	2,708,421	220
Sandwich and Other	43,522	207,945	378	3,510	32,260	819	40,012	175,685	339

* *Estimated by survey respondents for 1979.*

Source: U.S. Dept. of Commerce, Restaurant Business

RESTAURANT FRANCHISING
GROWTH IN NUMBER OF UNITS, 1974-1979

Major Activity	Total Units			Company-owned			Franchisee-owned		
	1974	1979*	% Change	1974	1979*	% Change	1974	1979*	% Change
Total	39,796	59,928	51%	10,115	16,781	66%	29,681	43,147	45%
Chicken	5,686	7,193	27	1,663	2,011	21	4,023	5,182	29
Hamburgers, Franks Roast Beef, etc.	22,069	27,833	26	3,425	5,077	48	18,644	22,756	22
Pizza	4,329	8,355	93	1,698	3,288	94	2,631	5,067	93
Mexican (Taco, etc.)	1,157	2,527	118	416	1,044	151	741	1,483	100
Seafood	759	2,444	222	325	901	177	434	1,543	256
Pancakes, Waffles	818	1,577	93	155	418	170	663	1,159	75
Steak, Full Menu	4,647	8,756	88	2,404	3,813	59	2,243	4,943	120
Sandwich and Other	331	1,243	276	29	229	690	302	1,014	236

* *Estimated by survey respondents for 1979.*

Source: U.S. Dept. of Commerce, Restaurant Business

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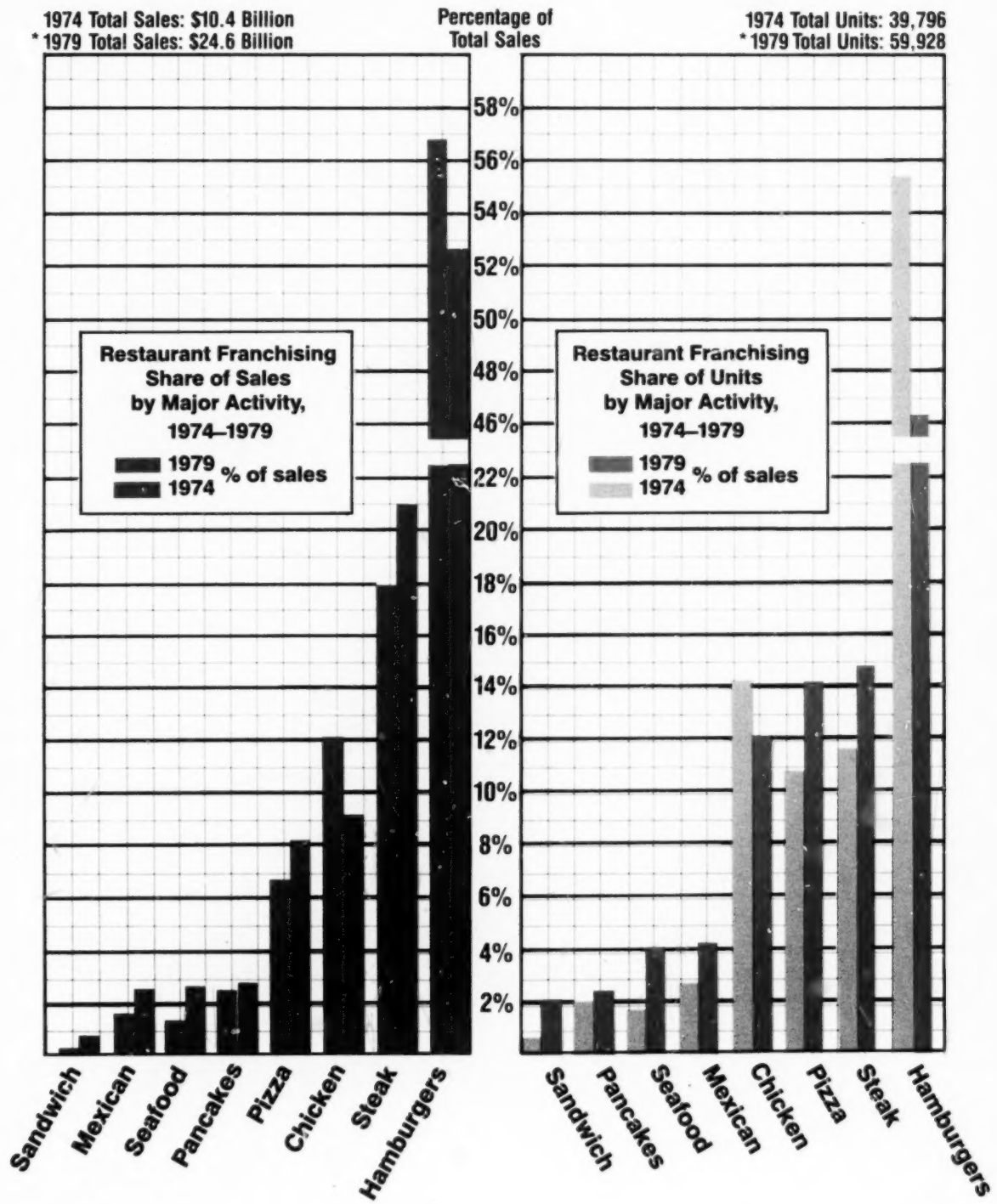
Menu expansion and diversification continues to increase to meet mounting competition from other restaurant chains and to enlarge customer counts



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The franchised restaurant sector continues its amazing success and popularity with sales rising faster than that of all eating places in the United States.

state disclosure laws if they file under the FTC rule.

The FTC disclosure statement contains detailed information on some 20 different subjects that may influence a prospective franchisee's decision to invest in a franchise.

Such statement must be presented to the prospective franchisee at the earliest of the following times: (1) the first personal meeting for serious discussion concerning the purchase of the franchise; or (2) 10 business days before the signing of any franchise or related agreement; or (3) 10 business days before the prospective franchisee tenders payment to the franchisor.

While the upward surge in the cost of energy and the higher costs of capital will affect a good number of franchised businesses, the overall outlook for franchising is quite promising; expectations are that it will remain a popular and ever-widening instrument in the distribution process of goods and services. Over the past three years, the net number of franchisors joining the franchise system has grown about 9 percent annually; this trend is expected to continue.

Areas that bear scrutiny in the near future are food, real estate, sun tan centers, and hair salons.

Franchised restaurants of all types, including fast food, continue to be the most popular sector of franchising. Stepped up activity can be expected in such areas as boosting customer counts, introducing new products, store upgrading or modernization programs, and expanding breakfast menus.

Some conglomerates that own leading restaurant chains are pouring in capital in order to boost sales for stronger return on investment.

Restaurants

The franchised restaurant sector continues its amazing success and popularity with sales rising at a rate faster than that of all eating places in the United States.

Menu expansion and diversification continues to increase to meet mounting competition from other chains and to enlarge customer counts that have been adversely affected by higher food costs and periodic gasoline shortages.

The higher costs of cosmetic and structural construction changes are forcing fast food franchisors to re-evaluate their investment in design, and cast their decor changes more and more in marketing terms.

Sales of franchised restaurants of all types reached $25 billion in 1979, up 17 percent over a year earlier; they are expected to jump about 18 percent, to $29 billion in 1980.

Franchised restaurants numbered 55,312 in 1978, increased to 59,928 in 1979 and are expected to rise to about 67,000 units in 1980.

The highest concentration of franchised restaurants continues to be in California, Texas, and Ohio.

Employment in restaurant franchising was 1,367,637 in 1978 and accounted for 30 percent of total franchising employment, more than any other franchise sector. Further-

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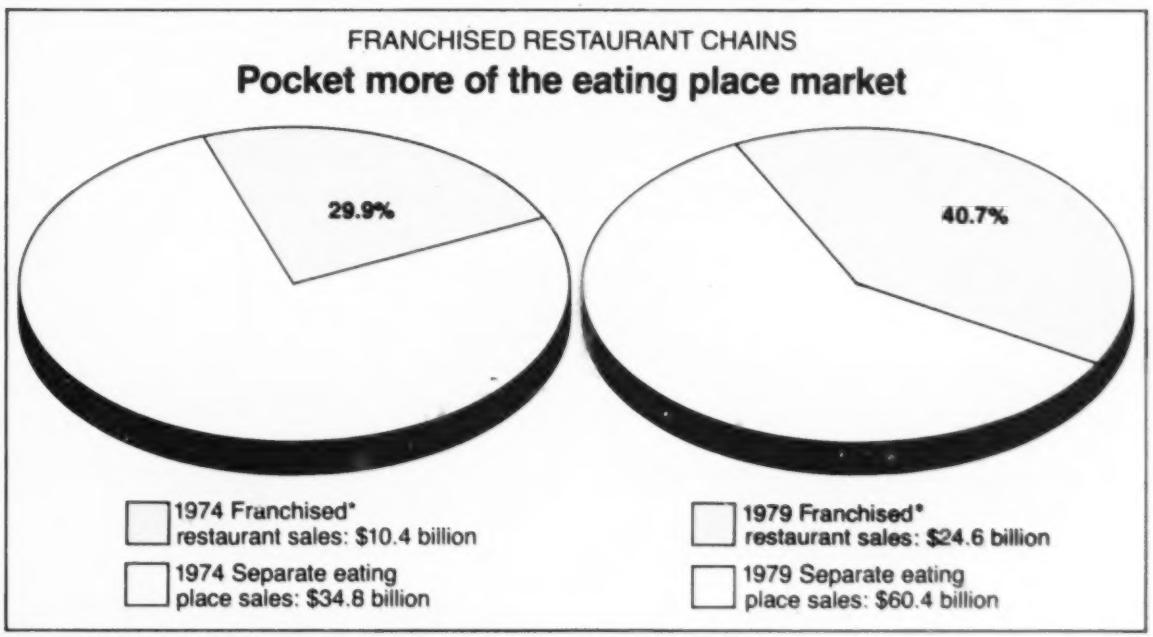
FRANCHISED RESTAURANT CHAINS
Pocket more of the eating place market
29.9%
40.7%
1974 Franchised* restaurant sales: $10.4 billion
1974 Separate eating place sales: $34.8 billion
1979 Franchised* restaurant sales: $24.6 billion
1979 Separate eating place sales: $60.4 billion

Source: U.S. Dept. of Commerce, National Restaurant Assn., Restaurant Business
** Includes both company and franchised-owned unit sales.*

During 1979, 17 franchisors with a total of 227 restaurants, 198 franchisee-owned, went out of business while 13 franchisors with a total of 168 restaurants, 84 franchisee-owned, decided to abandon franchising as a marketing method.

RESTAURANT FRANCHISING: 1978-1980

Major Activity	Firms	1978 Total Sales	1978 Company-Owned	1978 Franchisee-Owned
Total	388	$21,100,788	$6,733,545	$14,367,243
Chicken	31	2,034,012	653,977	1,380,035
Hamburgers, Franks, Roast Beef, etc.	117	10,862,837	2,589,465	8,273,372
Pizza	66	1,735,279	696,364	1,038,915
Mexican (Taco, etc.)	29	602,376	304,697	297,679
Seafood	11	563,827	216,486	347,341
Pancakes, Waffles	15	601,029	139,899	461,130
Steak, Full Menu	86	4,531,709	2,104,623	2,427,086
Sandwich and Other	33	169,719	28,034	141,685

* *Data estimated by respondents.*

RESTAURANT FRANCHISING: 1978-1980

Major Activity	Firms	1978 Total	1978 Company-Owned	1978 Franchisee-Owned
Total	388	55,312	15,510	39,802
Chicken	31	6,708	1,870	4,838
Hamburgers, Franks, Roast Beef, etc.	117	26,038	4,648	21,390
Pizza	66	7,542	3,042	4,500
Mexican (Taco, etc.)	29	2,329	993	1,336
Seafood	11	2,297	899	1,398
Pancakes, Waffles	15	1,441	363	1,078
Steak, Full Menu	86	7,924	3,479	4,445
Sandwich and Other	33	1,033	216	817

* *Data estimated by respondents.*

U.S. FRANCHISED RESTAURANTS, 1978-1980 SUMMARY

Item	1978	1979*	1980*	Percent Changes 1978-79	Percent Changes 1979-80
Total number of establishments:	55,312	59,928	66,672	8.3	11.3
Company-owned	15,510	16,781	18,549	8.2	10.5
Franchisee-owned	39,802	43,147	48,123	8.4	11.5
Total sales of products and services: ($000)	21,100,788	24,591,880	28,990,499	16.5	17.9
Company-owned	6,733,545	7,816,198	9,111,129	16.1	16.6
Franchisee-owned	14,367,243	16,775,682	19,879,370	16.8	18.5
Total sales of products and services by Franchisors to Franchisees: ($000)	548,782	706,053	857,810	28.7	21.5
Merchandise (non-food) for resale	33,013	37,534	48,656	13.7	29.6
Supplies (such as paper goods, etc.)	170,889	231,017	287,379	35.2	24.4
Food ingredients	298,063	383,774	481,004	28.8	25.3
Other	46,817	53,728	40,771	14.8	-24.1

* *Data estimated by respondents.*

more, franchised restaurant employees accounted for 40 percent of all persons employed in eating places in the United States.

The entry into the restaurant franchising system mostly by small companies continued in 1978 with a net gain of 38 franchisors, bringing the total to 388.

During 1979, 17 franchisors with a total of 227 restaurants, 198 franchisee-owned, went out of business while 13 franchisors with a total of 168 restaurants, 84 franchisee-owned, decided to abandon franchising as a method of marketing.

Big franchisors with over 1,000 units each increased to 11 in 1978 from 8 a year earlier. These 11 franchisors had 27,750 restaurants, 50.2 percent of all franchised restaurants, and accounted for $11.4 billion in sales, 54 percent of the total. Compared with 1977, the 8 franchisors with over 1,000 units each, had 45 percent of the total units and 47 percent of the sales.

In an effort to boost traffic, franchised restaurants, especially fast food units, are still emphasizing

Sales ($000)

1979*			1980*		
Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
$24,591,880	$7,816,198	$16,775,682	$28,990,499	$9,111,129	$19,879,370
2,247,838	765,738	1,482,100	2,563,755	899,485	1,664,270
12,961,887	3,038,923	9,922,964	15,521,446	3,595,801	11,925,645
2,007,066	776,902	1,230,164	2,364,317	903,182	1,461,135
648,100	315,922	332,178	766,692	377,652	389,040
667,098	260,633	406,465	772,794	299,624	473,170
681,728	164,023	517,705	834,135	216,290	617,845
5,170,218	2,461,797	2,708,421	5,883,140	2,779,340	3,103,800
207,945	32,260	175,685	284,220	39,755	244,465

Source: U.S. Dept. of Commerce

Number of Units

1979			1980		
Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
59,928	16,781	43,147	66,672	18,549	48,123
7,193	2,011	5,182	7,826	2,197	5,629
27,833	5,077	22,756	30,651	5,695	24,956
8,355	3,288	5,067	9,434	3,577	5,857
2,527	1,044	1,483	2,913	1,183	1,730
2,444	901	1,543	2,704	966	1,738
1,577	418	1,159	1,770	491	1,279
8,756	3,813	4,943	9,771	4,180	5,591
1,243	229	1,014	1,603	260	1,343

Source: U.S. Dept. of Commerce

Of the 388 restaurant franchisors surveyed, those featuring as their main activity hamburgers, franks and roast beef, continue to lead franchised food operations in sales and units by a wide margin, with sales of $10.9 billion.

DOMINANT TYPE OF SERVICE IN 1978

Major Activity	Self-service, Drive-in or Drive-thru	Waiter or Waitress Service
Of All Franchisors:	253	135
Chicken	30	1
Hamburgers, etc.	107	10
Pizza	38	28
Mexican	20	9
Seafood	9	2
Pancakes, Waffles	0	15
Steak, Full Menu	18	68
Sandwich and Other	31	2

CHANGES IN OWNERSHIP 1971-1978

	Units Repurchased for Company Ownership	Units Converted to Franchisee Ownership
1971	783	158
1972	413	145
1973	533	175
1974	477	198
1975	311	184
1976	280	413
1977	305	425
1978	321	312

Source: U.S. Dept. of Commerce.

menu diversification with the introduction of new products and breakfast lines, and stepped up promotion. Most companies, however, still concentrate on specific areas, such as hamburgers, hot dogs, roast beef, chicken, pizza, Mexican food, pancakes, steak, and submarine sandwiches.

Of the 388 restaurant franchisors surveyed, those featuring as their main activity hamburgers, franks, and roast beef, continue to lead franchised food operations in sales and units by a wide margin. For example, in 1978, 117 of these franchisors operated 26,038 units with sales of $10.9 billion.

Prior to 1976, the repurchasing of franchisee-owned restaurant units surpassed that of company units converted to franchisee-owned units.

This trend reversed itself in 1976 and 1977, but in 1978 units repurchased for company-ownership amounted to 9 more than those converted to franchisee-ownership as shown on page 139.

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In order to compete with other restaurant chains, many franchise operators have become more customer oriented and are offering such amenities as waiter/waitress service or self/drive-in/drive-thru service.

Most restaurants offer one type or the other, but 22 franchisors offer both types of services, although one type clearly dominates. Listed on page 139 are the principal types of service provided by franchised restaurant chains in 1978.

Faced with severe competition from fast food restaurants and with an increased tendency by consumers to eat away from home, the nation's grocery chains have come up with one stop centers through the introduction of expanded lines of frozen dinners, more prepared foods and delicatessen departments, while some supermarkets are even installing sit-down restaurants or opening restaurant chains.

Other food retailers

Convenience stores are actively searching for ways to compete with fast food restaurants by offering a wide variety of takeout foods such as hot and cold sandwiches, coffee, chicken, hot dogs, and an assortment of other dishes, precooked by the supplier and requiring only reheating or reconstituting in a microwave oven.

A growing number of these stores are realizing extra sales by installing gasoline pumps, usually self-service, on their premises.

In addition, parking areas of convenience stores are becoming sites for car wash equipment and even auto repair services.

The growth of convenience stores during the next few years is expected to continue in small towns and suburban fringes of metropolitan areas. Sales moved up to $5.5 billion in 1979, 9 percent above a year earlier while the number of franchised establishments were reported to be 15,014. Further gains are expected in 1980; 9 percent in sales and 7 percent in number of establishments.

The retailing of food by specialty

Big franchisors with over 1,000 units each increased to 11 in 1978.

food shops, donut shops, ice cream stores, coffee services, and others amounted to $6.5 billion in 1979, 6 percent over the previous year; sales in 1980 are expected to reach $7.4 billion.

The number of establishments in 1979 was 15,783, expected to rise to 17,180 in 1980.

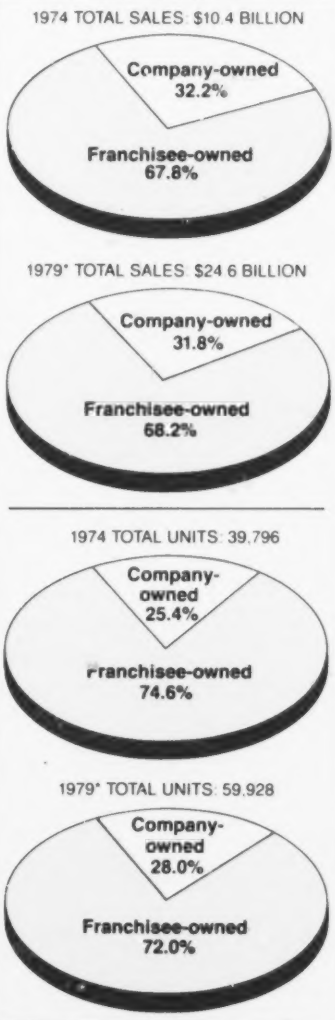
Two of the better known groups in this category are donut shops and ice cream stores.

In 1978, there were 17 franchisors of donut shops providing jobs for 32,874 workers.

Sales and establishments for donut shops for the years 1978-80 are listed on page 126.

The sales and units of the 24 franchisors of ice cream stores, who in 1978 created employment for 35,060 persons, are listed in the table on page 125.

Franchisees share of market



** Data estimated by respondents*
Source: U.S. Dept. of Commerce, Restaurant Business

International markets

Rising disposable income, improved communications and transportation, and the growing demand for consumer goods and services in many foreign countries are the underlying reasons for the unparalleled interest in foreign markets of growing numbers of U.S. franchise companies.

The growth rate in number of foreign units continues to far exceed that of domestic expansion. In 1978, the number of such units grew by almost 21 percent while in 1977 it grew by 15 percent. The Department of Commerce survey reveals that 266 franchising companies operated 17,156 outlets abroad in 1978 compared to 156 with 3,365 outlets in 1971.

The form of entry into foreign markets varies considerably, with many firms using more than one method in conducting foreign operations.

Of the 266 franchisors doing business in foreign countries in 1978, 239 sold their outlets to franchisees either directly or through a master licensee who received the right to develop the franchisor's system in a specific country or region, 24 operated joint ventures, and 33 had some company operated units.

Twenty-two of these companies derived 10 percent or more of their income from foreign operations, 19 firms received between 5-9 percent, 75 between 1-4 percent, and 150 received less than 1 percent.

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The highest concentration of franchised restaurants continues to be in California, Texas and Ohio while Illinois, Michigan and Florida come in second.

U.S. FRANCHISED RESTAURANTS*
Number of Establishments by State: 1978

State	Total	Company-Owned	Franchisee-Owned	State	Total	Company-Owned	Franchisee-Owned
Alabama	944	249	695	Nebraska	483	151	332
Alaska	47	0	47	Nevada	197	64	133
Arizona	682	209	473	New Hampshire	120	24	96
Arkansas	595	150	445	New Jersey	914	219	695
California	4,844	1,308	3,536	New Mexico	336	61	275
Colorado	845	226	619	New York	1,883	628	1,255
Connecticut	457	109	348	North Carolina	1,155	257	898
Delaware	84	12	72	North Dakota	157	12	145
District of Columbia	72	30	42	Ohio	3,070	1,033	2,037
Florida	2,050	689	1,361	Oklahoma	1,051	404	647
Georgia	1,641	665	976	Oregon	631	145	486
Hawaii	143	61	82	Pennsylvania	1,543	386	1,157
Idaho	214	37	177	Rhode Island	104	15	89
Illinois	2,604	690	1,914	South Carolina	668	189	479
Indiana	1,673	448	1,225	South Dakota	176	17	159
Iowa	1,056	142	914	Tennessee	1,220	369	851
Kansas	770	203	567	Texas	4,718	1,713	3,005
Kentucky	1,061	248	813	Utah	311	75	236
Louisiana	761	231	530	Vermont	42	0	42
Maine	115	26	89	Virginia	1,165	333	832
Maryland	566	171	395	Washington	777	211	566
Massachusetts	576	170	406	West Virginia	386	94	292
Michigan	2,108	506	1,602	Wisconsin	1,054	237	817
Minnesota	1,084	284	800	Wyoming	134	13	121
Mississippi	553	71	482				
Missouri	1,141	405	736				
Montana	182	3	179	TOTAL	49,163	13,993	35,170

** Represents 89 percent of total establishments. The remaining 11 percent were unable to provide a geographic breakdown for this report.*

Source: U.S. Dept. of Commerce.

INTERNATIONAL RESTAURANT FRANCHISING IN 1978
Location and Number of Establishments*

Major Activity	U.S. Firms	Total	Canada	Mexico	Caribbean	Europe		Asia		Australia	Other**
						United Kingdom	Other	Japan	Other		
Total	70	3,340	1,196	84	150	454	164	590	120	384	198
Chicken	8	1,014	87	48	66	259	20	185	31	186	132
Hamburgers, etc.	12	1,726	831	12	55	182	142	298	55	108	43
Pizza	6	268	53	6	9	7	2	50	30	89	22
Mexican	4	18	0	0	17	0	0	0	1	0	0
Seafood	3	56	53	0	0	0	0	3	0	0	0
Pancakes, etc.	3	8	6	0	0	0	0	1	1	0	0
Steak, etc.	15	250	166	18	3	6	0	53	2	1	1
Sandwich, etc.	0	0	0	0	0	0	0	0	0	0	0

** Includes company-owned, franchisee-owned, and joint ventures.*
*** Includes South America, Africa, New Zealand, and Central America.*
Source: U.S. Dept. of Commerce, Bureau of Industrial Economics.

Canada is the dominant market for U.S. franchisors, with 41 percent of all U.S. foreign franchised outlets located there. A total of 187 franchising firms with 7,048 units operated in Canada in 1978, predominately in non-food retailing (1,350), automotive products and services (1,270) and fast food restaurants (1,196).

Japan continues to be the second largest market for U.S. franchisors with a total of 2,632 units of which 75 percent represent various food categories such as fast food restaurants, donut shops, ice cream stores, and convenience food stores.

The United Kingdom ranks third with 1,976 outlets, while 2,145 are located in all of continental Europe.

An additional 80 U.S. franchisors are now planning to extend their franchising operations to foreign markets by the end of 1980; 27 of these are fast food franchisors.

Retail sales of all firms associated with the franchise system—franchisee-owned and company-owned—reached an estimated $279 billion in 1979, and accounted for almost 32 percent of all retail sales in the U.S.

In 1980, retail franchising is expected to reach $299 billion, a rise of 7 percent over 1979. Retail franchising accounts for 89 percent of all franchising gross receipts. □

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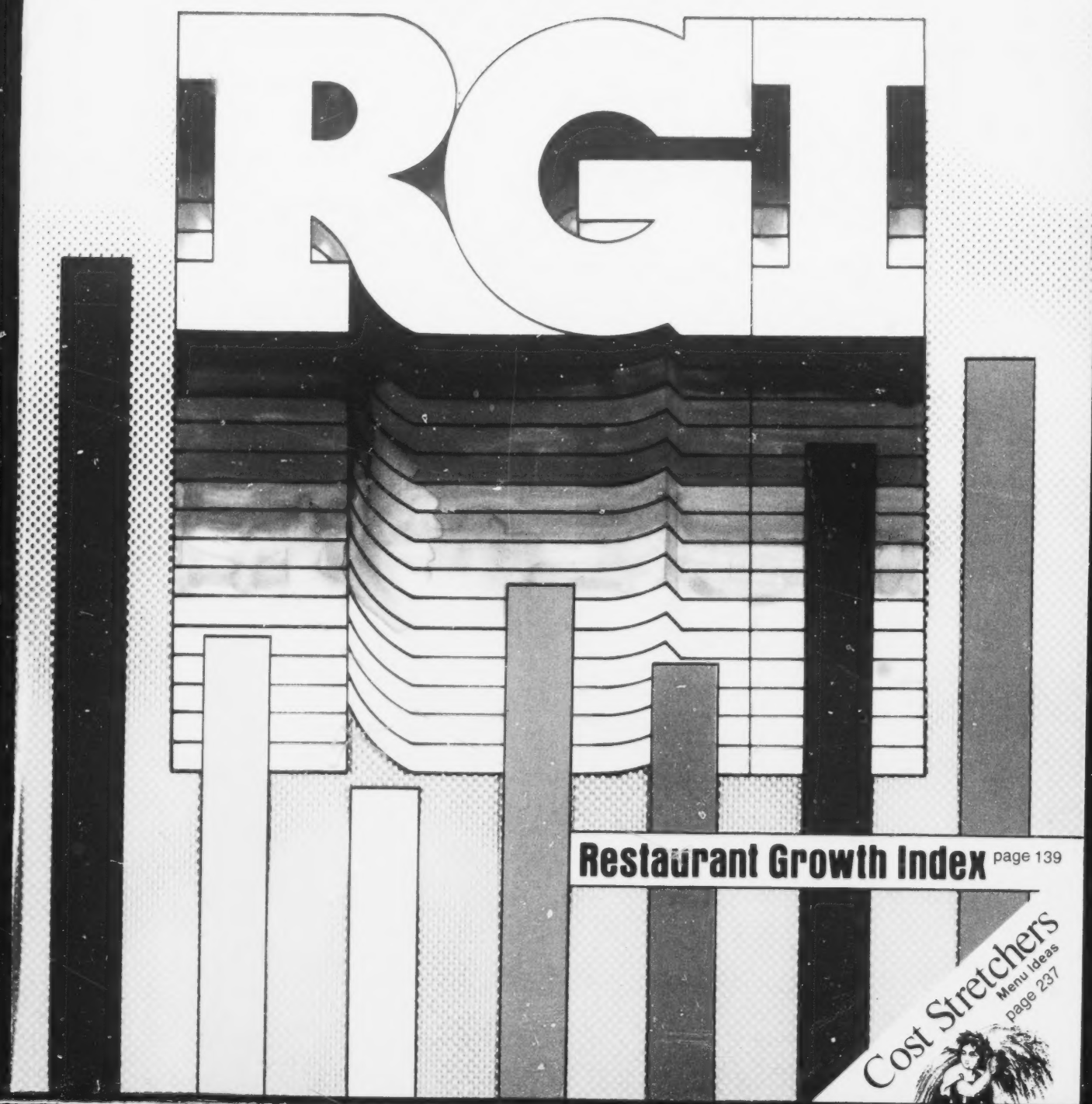
Restaurant Business

SEPTEMBER 15, 1980



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Restaurant Business

SEPTEMBER 15, 1980 VOL. 79, NO. 12

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Cover illustration by Joan Dworkin

Restaurant Growth Index

Our 13th Annual Restaurant Growth Index is divided into two major sections. First comes our market-by-market study of the major trends in the industry as well as sales, purchase and growth data for 8 major market and 36 sub-market segments. Next, comes our statistical profile of the country's 300 metro areas and 214 ADIs.

13th Annual Restaurant Business Growth Index

In this year's edition of the *Restaurant Business* Growth Index, we provide "hard data for 1978", best estimates for 1979 (the last full year), and a five-year projection to 1984 for planning purposes.

Foodservice sales in 1979 increased 9.1 percent to a total of $102,854,000,000. This is a conservative figure as it does not include a commercial equivalent dollar volume for military feeding or school foodservice (we count only cash paid by students as actual sales); and it does not include much of vended soft drinks or vended candy. If we adjust our figures to reflect the higher commercial equivalents and include additional vended categories, we would show industry sales of $117,083,000,000, an increase of $14,229,000,000 or 13.83 percent higher than our published figure. In our view, these adjustments are not valid because they produce a result which is, in turn, inflated (military and school feeding), not comparable (candy sales are not included in the Census of Retail Trade's merchandise line for meals and snacks or alcoholic beverages), or in the case of bottle vended and can vended soft drinks, through a restricted distribution network.

For 1984, we estimate foodservice sales of $166,291,000,000. This is a gain of $63,437,000,000 for the five-year period. This translates into a total growth of 61.68 percent or a compound annual growth of 10.08 percent.

We have added calculations of real growth (actual sales growth adjusted for the increase in menu prices and for wholesale prices).

With inflation factored out, total industry sales declined 1.9 percent in 1979. And on a real growth basis, sales in 1979 dollars will increase only $4,787,000,000 by 1984; a compound annual real growth of 0.91 percent. Stripping away the inflationary mask reveals that the real total growth is not 61.68 percent for the five year period but only 4.65 percent. It is our judgment that the industry will grow under its potential since inflation has caused an increase in the fixed charges against income. Because of the increase in fixed charges, such as taxes, and energy, there is relatively less income for eating out and the softness in customer counts bear this out.

If the inflation rate were reduced by three points it would translate into a direct increase in real growth because people now are not going out to eat as much as they would like. The potential is there for four percent real compound annual growth. The dollar difference in real terms between potential real growth and what we are forecasting is $17,497,000,000. In other words, the industry could grow 4.6 times current projections in real terms.

Another way to look at it: We are forecasting that the industry will achieve only 21.5 percent of its next five year's potential. We estimate that menu price increases will grow at a 9.29 percent compound annual rate. Wholesale food prices will increase at a slower 7.95 percent compound annual rate, over the five-year period.

We use compound annual growth rates to express change in our projections because they are mathematically correct. To illustrate, if we multiply the 1979 industry total by 1.1008 and then multiply the result by 1.1008 and did this procedure three more times we would obtain the 1984 result of $166,291,000,000. If this concept is applied using 12.34 percent the average annual figure, (61.68 percent total growth divided by five years), the result would be $184,032,000,000 in 1984.

Although personal income is projected to grow at a compound rate of 11.4 percent through 1984, we see a rate below that for the commercial/contract sector due to: the high rate of unemployment in 1980 and 1981, high inflation, increase in fixed charges against income such as mortgage rates, debt service, gasoline, etc. The institutional/internal segment is driven by population changes in the institutions which are flat to slightly negative.

This summary was prepared by RBI Research and Malcolm Knapp, president of Malcolm M. Knapp, Inc., New York. The 1978 sales and purchases data used in this eight major market and 36 sub market growth report were prepared by Mr. Knapp under contract with the National Restaurant Association. Estimates for 1979, and projections to 1984 were prepared specifically for Restaurant Business *Magazine.*

There are some fundamental changes occurring in the marketplace.

Travel has changed dramatically in just the last year. In 1979, the lack of gasoline kept people from driving and to some extent transfered them to the airplane.

In 1980, the cost of gasoline has reduced driving by some seven percent and has brought the prior year's tremendous gain in air traffic to −2.8 percent for domestic trunks for the first 6 months of 1980 versus the first 6 months of 1979. And in 1979, the first 6 months were up 14.8 percent over 1978. Airline fuel is double what it was a year ago.

This will have substantial effects on air travel and on air travel patterns. We may see patterns shifted to where the best promotional value exists.

The eating place segment is dealing with the cost pressures that changed the price points through the use of promotions, changing menu items and multi-tier pricing. What clearly is happening is that people are making large scale changes in their behavior very quickly and the operators must be prepared to go with the flow of events.

The issue on which all consumers are focused is the concept of value. Everyone talks about it, and has for several years. This year I think that the most critical element in the value perception is service. The food must be adequate but *the service must be great.* In these confusing and uncertain times people are very sensitive to the way others behave towards them. Partly because of the uncertain times and the pressures of the flattened standard of living, the concept of *volatility* is one which will enter our business lives in the next five years.

We are going to see more of the behavior that we saw in March of 1980 when the reaction of people to the unexpected credit curb was a very sharp curtailment of almost all purchasing activity. This was followed by a substantial recovery in April as people got bored with their overreaction. People are cutting back on food and eating out but they don't want to. This will give rise to a pulse effect where people will behave like dieters. They will really cut back and then go on a binge.

Summary

	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Total Market	94,309	43,931	10.4	102,854	47,226	9.1	166,291	10.1	0.9
Commercial/Contract	79,366	32,670	10.7	86,568	35,224	9.1	142,307	10.4	1.1
Institutional/Internal	14,318	9,611	9.1	15,599	10,471	8.9	22,962	8.0	0.1
Military*	624	1,650	9.1	687	1,531	10.1	1,022	8.3	0.3
Major Market Segments									
Eating/Drinking places	61,293	23,052	10.6	66,799	25,070	9.0	109,934	10.5	1.1
Hotel Motel Market	5,411	1,913	12.4	5,931	2,097	9.6	9,683	10.3	0.9
The Transportation Market	1,501	670	14.5	1,725	771	14.9	2,912	11.0	2.6
The Leisure Market	2,007	776	11.8	2,225	860	10.9	3,904	11.9	2.4
The Retail Market	3,133	1,199	8.5	3,417	1,307	9.1	5,520	10.1	0.7
The Business Industrial Market	5,871	6,635	10.9	6,317	7,262	7.6	10,188	10.0	0.7
The Student Market	5,213	4,193	8.4	5,630	4,517	8.0	8,173	7.7	−0.2
The Health Care Market	8,105	4,015	9.3	8,887	4,407	9.6	13,195	8.2	0.2

Wholesale price index will increase at 7.95% compound annual rate through 1984.
Menu price index will increase at 9.29% compound annual rate through 1984.
** Sales data based on post exchanges, and clubs; purchase data based on post exchanges, clubs, and troop feeding.*

Separate Eating & Drinking Places

Separate eating and drinking places, which account for the lion's share of both purchases by and sales in the total foodservice industry, has experienced a slowing growth rate over the past two years. In 1978, the separate eating and drinking place market grew at a rate of 10.6 percent versus 10.8 percent in 1977. And its growth rate fell to 9.0 percent in 1979.

Over the five-year period of 1979 to 1984, compounded annual growth is estimated at 10.5 percent. But, with inflation factored out, real compounded annual growth is reduced to 1.1 percent—still an impressive rate but nowhere near the two to three percent annual growth rates of the 1970s.

The basic problems confronting the separate eating place market today are familiar ones: soft customer counts, consumer resistance to increased menu prices, escalating labor expenses and high food costs. These problems are being confronted and attacked by management in a variety of ways: menu diversification, stepped up marketing and promotional activities, multi-tiered menu pricing, trimming labor costs and controlling food expenditures, all while still maintaining value and quality.

An additional factor is the increased competition that eating places face from the food-at-home market. For the past several months away-from-home food prices have increased at a much higher rate than at-home food prices. Also, the growing availability of take-out food from retail food establishments—gourmet shops, convenience stores, supermarket delis, etc.—especially in urban and suburban areas, is impacting on the market.

ILLUSTRATIONS BY JAYE MEDALIA

Personal disposable income has been cut as a result of inflation, high unemployment and the general recessionary state of the economy. Therefore, the separate eating place market is being challenged to re-establish its positive price/value perception in the eyes of today's frugal consumer.

Although Carter administration economists claim the recession won't last into 1981, other experts see an extended period of economic stagnation. As in the past, the restaurant business is one of the first segments of the economy to feel the effects of an economic downturn, but it is likely to be one of the first to bounce back as discretionary income increases.

In order to deal with the rapidly changing market conditions, the separate eating place market is now entering a period of retrenchment and re-evaluation. Fearing that customer counts will remain soft and customer loyalty will continue to erode, the large chains have embarked on plans to: diversify menus, change decors to attract a wider variety of patrons, and employ new marketing techniques—sweepstakes, games, entertainment, increased advertising and promotional expenditures—to build customer trial and frequency.

Some analysts feel that a fundamental change is occurring in the eating place market which will radically alter the way the industry does business. The consumer is searching for even more value for his money.

Consumers are still eating out, but less frequently. And, when they do eat out, they demand better food, attentive service and pleasant surroundings. But they are willing to pay the price if they feel they are receiving the value for their money. In short, improving the price/value perception of one's restaurant by the consumer will become even more crucial to success in the 1980s.

The facts of the demographic picture are hard to ignore. According to the *1980 Forecaster's Handbook* (See population chart on page 172), the 25-34 year old age group will increase 19 percent by the end of 1990, while the 35-44 group will increase by a phenomenal 51 percent during the same time period. In addition, the 18-24 year old age group will decline by 13 percent. The market is becoming older and more sophisticated, and is therefore more demanding of value for its money. A huge proportion of this population will have grown up in the "fast food era," are used to eating out regularly and are unlikely to give it up. In addition, the increased number of women in the workplace is responsible for more dining away from the home.

This changing market has new demands and requirements to be met. Some restaurateurs are already witnessing the demise of the traditional three meal period pattern. The other meal periods becoming popular include: mid-morning, late afternoon and late night.

A trend towards the consumption of the major meal of the day has also been noticed. The popular-

ity of all-day (and night) menu items such as quiche, salads, crepes and omelettes attest to changing tastes and dining patterns. More and more establishments are now offering these versatile menu additions along with their traditional breakfast, lunch and dinner items.

Although people may *want* to eat out more frequently, the current state of the economy has had an incredible impact on people's purchase behavior patterns. This was apparent during the exaggerated credit crunch in March and April of 1980. As soon as people became frightened that there were no longer those reserve credit accounts or overdraft protection at their banks and that percentage payments on credit cards would increase, consumer spending decreased.

As a result of these factors, the major restaurant chains and the independent restaurant segment are changing their marketing stategies, pricing structures, menu and decor packages to keep consumers interested and to make them feel that the money they spend on food away from home is worth the price they must now pay.

The phenomenal success of breakfast programs in such innovative chains as Hardee's and McDonald's has spawned a whole new market for the fast food industry. With breakfast accounting for up to 20 percent of sales in some Hardee's units, it is no wonder that the testing of breakfast has been begun by A & W, Wuv's, Popeye's, Burger King, Wendy's, Burger Chef and Gino's. The disadvantages of instituting a breakfast program include increased marketing and promotional support costs and the fear that breakfast may interfere with traditional menu items sales.

Other chains, most notably Burger King, have tested and introduced "dinner" fare in an effort to attract more patrons. The popularity of Burger King's specialty sandwich line of fish, chicken, steak and ham-and-cheese (and which will include roast beef by the end of the year) has not been lost on the other chains. McDonald's has been testing its McChicken sandwich and systemwide introduction is soon expected. Wendy's, which has always had a limited menu, is expanding its offerings to include a salad bar, chicken sandwich and "child-size" hamburger.

Long dependent on their traditional menu items, the pizza giants are also discovering that they too must diversify to remain competitive. Pizza Inn, among others, has introduced a deep-dish Sicilian pizza, partly in response to the regional chains such as Godfather's and Mr. Gatti's (See Restaurant Business, August, 1980.)

Pizza Hut is allocating substantial advertising resources to promote its new pan pizza and the company is testing a new pizza unit called Solo's Express. This concept is designed to compete with the traditional fast food chains for the lunch trade. Solo's offers individual six-inch pizzas and "90 second" service.

Shakey's is currently expanding its menu to feature such new items as nachos and deep-fried mushrooms, zucchini and okra and is supporting it with a marketing campaign promising "pizza, pasta and more."

The mature chains, in particular, have found that they must expand their limited menus somewhat if they are to appeal to more customers and hang on to the patrons they already do have. The next big craze? Possibly ribs—the low cost of pork and the "fun" aspect of eating ribs may combine to make ribs the menu star of the 1980s. Witness the phenomenal success and growth of Tony Roma's (Restaurant Busi-

Separate Eating and Drinking Places Sales

1978: $61,293,000,000 +10.6% Sales Growth			1979: $66,799,000,000 +9.0% Sales Growth					
1984: $109,934,000,000 +10.5% Sales Growth Compound Annual; +1.1% Real Growth Compound Annual								
	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Separate eating places	54,615	20,617	11.4	59,743	22,497	9.4	101,266	11.1	1.7
Full menu restaurants and lunchrooms	29,186	11,381	9.1	31,460	12,268	7.8	51,090	10.2	0.8
Social caterers	721	292	4.1	745	302	3.3	1,007	6.2	−2.8
Public cafeterias	1,879	712	6.4	1,996	756	6.2	3,080	9.1	−0.2
Limited menu restaurants	21,757	7,869	15.1	24,356	3,792	11.9	44,097	12.6	3.0
Ice cream, frozen custard stands	1,072	343	16.6	1,166	379	10.6	1,992	10.9	1.5
Bars and taverns	6,678	2,435	4.0	7,056	2,573	5.7	8,668	4.2	−4.6
Total	61,293	23,052	10.6	66,799	25,070	9.0	109,934	10.5	1.1

ness Magazine, April, 1980).

Menu diversification is only one way to try to bring in new business and encourage repeat customers. New decor and design packages have been introduced at every major chain. The clean, fresh and natural "California" look has swept the fast food industry and also numerous independent restaurants. The new decor packages were prompted in part by changes in menu prices. "You can't serve sandwiches which cost upwards of $2.00 in cheap surroundings," says one marketing executive for a major chain. "You get to the point where customers resist and won't spend that kind of money in that type of environment anymore. So, you change. You have to."

Hillary's, at Water Tower Place in Chicago, features an octagonal bar area.

A Burger King built recently in Providence, Rhode Island was converted from a former men's store by the Jan Company, a Burger King franchisee. Called "The Banker's Quarters," the unit is almost elegant, including restored antiques which help to create a masculine, homey atmosphere. "It is the trend for the fast food establishment of 1980s and 1990s," says Nicholas W. Janikies, president of Jan Company. "People expect more now for their money, and that all starts with the facilities."

The direction marketing has been taking is also indicative of changes sweeping the restaurant industry, in line with the changing demographics of the United States. While McDonald's continues to sell the kids, others have begun to emulate Wendy's attack on the older age groups, a marketing theme which indicates awareness of the increased price/value perceptions on the part of a more mature market. Jack-in-the-Box recently began a marketing campaign featuring the destruction of its well-known clown, a symbol of its former push for the children's market. Demographics show, and savvy advertisers realize, that the adult market is where it's at. In addition, regional advertising has become a more popular marketing tool. Coupons are still being used extensively.

Lum's, the Florida-based chain now controlled by Frederich Jahn's Wienerwald empire, has employed direct-mail advertising in conjunction with the introduction of Wienerwald chicken in Lum's units. According to Baird Thompson, director of communications for Lum's, the response to the mailings, offering two-for-one specials, has been "way above expectations."

Because of the tight credit market and the ever-decreasing amount of prime real estate available for restaurant operations, unit construction is down. This will be partly responsible for a slower rate of growth over the next few years. To compensate for it, customer counts in already existing units must be bolstered for restaurants to maintain their traditionally high annual growth rates. Additions to existing units help in this respect, as does the construction of drive-through windows. When new units are built, it is done in already existing markets rather than in new areas. Building in older markets allow establishments to piggyback on already-existing customer recognition and advertising.

Burger King has introduced Burger Stop, a strictly take-out version of the larger store, which allows the chain to increase sales with minimum of new construction. Drive-through windows added to existing units accomplishes much the same purpose.

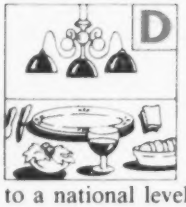
The international market is still gaining in importance for the major fast food chains. McDonald's, Pizza Hut and Kentucky Fried Chicken have all made firm commitments to increase their unit openings in foreign markets.

In 1979, foreign operations accounted for 17 percent of McDonald's system-wide sales and 15.5 percent of systemwide units. According to Steven J. Barnes, chairman of McDonald's International Division, "In 1980, we expect to open around 200 restaurants in markets outside the United States."

And foreign restaurants continue to make their presence felt in the United States as well. Wienerwald has gained a significant toe-hold with the purchase of Lum's and IHOP. And a number of Canadian and Japanese chains continue to penetrate the American market.

Today, separate eating places are fighting against customer resistance, high prices, inflated energy, labor and food costs and the food-at-home market. To succeed in the 1980s will require ingenuity and perseverence by creative and professional management.

The Hotel/Motel Market



During the 70s, hotel operators were generally able to adjust to the impact of inflation. Occupancy rates rose to a national level of 73 percent in 1979 (high above the break-even point of 58.5 percent) and during the latter part of the decade, dollar profits also rose substantially.

According to Laventhol and Horwath's 1979 U.S. Lodging Industry report, the hotel/motel industry entered this recession in much better shape than in 1974.

This is partially attributable to the high level of demand experienced during the past three years. And despite the rapid rise of energy and labor costs, the industry has enjoyed fairly good profits.

Another factor benefiting the hotel/motel market was the more even balance between supply and demand. Previously, there were too many rooms and too few customers. However, in the current market, there has been a slowdown in supply growth due to inflation, the cost of capital and the cost and availability of prime sites. This should work in the favor of those lodging chains which already have a large number of rooms in place.

In 1979, total lodging industry sales were estimated at $22.3 billion. Foodservice sales in this segment reached $5.9 billion—an increase of 9.6 percent over 1978 sales. However, the growth in food sales continues to lag behind room sales growth (12 percent in 1979).

Energy has had a two-fold impact on the industry and its sales. First the skyrocketing cost of energy has resulted in intensive exploration of conservation methods.

Second, and more important, the rising cost of fuel and fluctuations in oil availability had a negative impact on travel in 1979. Although there has been no fuel shortage as severe as the one experienced in April-July '79 (when some reported sales drops of 25-35 percent), the higher cost of travel and the downturn in the economy make the short-term outlook bleak. A curtailment of pleasure travel is expected.

"The east is still strong," says Joseph Gardner, Hilton Hotel's senior vice president of food and beverage. "But there has been a fall off in occupancy in some of our resort hotels. Hawaii is especially soft."

Like the resort business, convention catering is also slightly off. The downturn is evidenced by lower number of attendees, fewer convention participants bringing spouses along, and a cutback in the size of the foodservice package ordered. For example, a company may once have sponsored a complete banquet but today confines convention catering to a cocktail party and hot hors d'oeuvres.

"There has been a slight decrease in convention business," says Eric Nussbaum, food and beverage director of the International Hotel in Baltimore, Maryland. "A company that once spent $6 a head for 50 people now spends $10 a head for 20 people. Also, companies are sending only their top management rather than top *and* middle management to conventions."

Hotel/Motel Market: Foodservice Sales

1978: $5,411,000,000 +12.4% Sales growth			1979: $5,931,000,000 +9.6% Sales growth					
1984: $9,683,000,000 — +10.3% Sales Growth Compound Annual; +0.9% Real Growth Compound Annual								
	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Hotels	3,016	1,053	12.6	3,312	1,156	9.8			
Motor hotels	742	259	13.0	813	284	9.6			
Motels	1,653	601	11.7	1,806	657	9.2			
Total	5,411	1,913	12.4	5,931	2,097	9.6	9,683	10.3	0.9

According to Laventhol & Horwath, business people, conventioneers and government officials make up nearly two-thirds of the hotel/motel market's clientele. As a result, many marketing efforts are directed towards this group.

Hilton's new "Fitness First" campaign is designed to appeal to the health-conscious traveling executive.

The concept, which is being tested in 100 Hilton coffee shops, features a menu that includes lighter foods and lists the calories. A full color recipe booklet and an exercise program developed by Olympic marathon runner, Frank Shorter, are also available.

"We altered our previous menu concepts and changed to the Fitness First campaign because we saw this as responsive to the trend in national dining habits," says Gardner. "Since so many people are health conscious these days we are providing our own healthful alternative."

Gardner also notes that if the program gets a favorable response, Hilton may run "a campaign a year geared to what people want on a national basis."

At the Cleveland Marriott Inn/Airport, the business traveler who wants a quiet drink is in for a surprise. Shennanigan's, the hotel's lounge, is "more of an entertainment complex than just a hotel bar," says James Adkins, the hotel's general manager.

Shennanigan's—which averages $25,000-$35,000 per week—features live entertainment, two dance floors, a fireplace, a television lounge and a dozen backgammon tables. A snack menu includes a cheese tray, nachos, spare ribs and fried tempura.

Shennanigan's pulls not only the hotel guest but local customers from a 10-mile radius.

Historically, the food and beverage operations of hotels/motels have not been regarded as profit centers. But today, to pick up the slack caused by fewer business and pleasure travelers, hotels/motels are turning to their food and beverage operations to generate added income. As a result, their restaurants and lounges are becoming more competitive within their local markets.

A week-long strawberry festival at Baltimore's International Hotel increased its Sunday brunch by 70 covers and generated heavy local traffic.

One of the most aggressive campaigns to remain competitive was undertaken by Phoenix-based Ramada Inns, a company with a substantial number of properties in downtown and suburban areas.

"Over the last three years, we have spent a total of $80 million in remodelling and renovation," says Kenneth Jensen, director of public

Shennanigan's—at the Cleveland Marriott Inn/Airport—is an entertainment complex for local and hotel customers.

relations. Of that amount, 35 percent is directed toward upgrading food and beverage facilities.

Ramada Inn is investing in three restaurant concepts: Summerfield's, Sun Blossom's, and Pancake Hauses. Summerfield's (there are currently 26 in operation) is the company's "quality" restaurant featuring a menu mix of such trendy foods as sandwiches of avocado and bay shrimp, baked potatos with choice of toppings and quiche made with gruyere cheese. Properties are given the flexibility to add popular local dishes to the menu.

To attract that ever important local crowd, each Summerfield's features some kind of entertainment (live or recorded) in its lounge.

The second concept, and fewest in number is Sun Blossom's (six currently in operation). This is the company's upgraded coffee shop and it features a less complicated menu than Summerfield's.

The third concept is the Pancake Hauses for Ramada Inns with roadside locations. The 37 restaurants appeal to family travelers who want fast service.

Prime Motor Inns, a wholly-owned subsidiary of Prime Management Company, owns/operates 28 hotels and motor inns including 13 Ramada Inns. To attract the local clientele to its properties, the company has developed its own restaurant/lounge concept called Sandalwood.

"We opened our fifth and latest Sandalwood Restaurant and Lounge in East Hanover, N.J.," says Joel Simon, president and director of operations for the company. Simon estimates the Sandalwood concept draws 60-70 percent of its customers from the local area.

The steak and seafood menu is standard at each Sandalwood and dinner checks average $12.50. Simon estimates average sales volumes at an excess of $1 million per unit.

"Conventions don't cancel but we have noticed a smaller number of attendees," says Steve Marcus, president of the Marcus Hotel Corporation, a division of the Wisconsin-based Marcus Corporation.

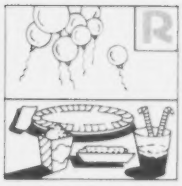
"We've seen a drop of five to eight percent in convention attendance at two of our Milwaukee properties, the Pfister Hotel and the Marc Plaza," he says.

The Marcus Hotel Corporation also owns and/or operates the Sheraton Mayfair Inn in Milwaukee, two Guest House Inns in the state and 10 Budgetel Inns in five midwestern states.

The company's Budgetel Inns have not felt the economic pinch as evidenced by the unusually high average occupancy rate of 90 percent. Marcus attributes the high rate to the units low room rates which average between $22-$25 a night.

After 11 p.m. entertainment at the Ramada Inn's Sandalwood Lounge in East Hanover, N.J. spills into the restaurant.

The Leisure Market



Restaurant Growth Index data show that the leisure market, which is second only to transportation in projected real growth, will increase 2.4 percent (real compound annual growth) each year between now and 1984.

A variety of factors are fueling the continued growth of the leisure segment.

America is a country at play: the number of hours Americans have available for leisure has increased, as leisure time activities have become a way of life to many Americans.

Today, people are more concerned with themselves. Physical fitness, the importance placed on health and exercise, and the turn towards natural foods are all indicative of this mood. America is in the midst of the "Me generation," and a great deal of that has to do with having a good time. That's where leisure activities come into the picture. Americans no longer consider leisure time a luxury. Instead, it is a necessity. The consumer, even in uncertain economic times, appears unwilling to curtail those leisure activities he has come to take for granted.

However, one looming problem stands in the way of continued growth in the leisure segment: energy. In particular, the possible nonavailability and certain higher cost of gasoline for the consumer to travel to leisure market destinations.

Local entertainment—such as sporting events, regional amusement parks and bowling lanes—which requires less gas to transport patrons to the site of the event, has increased in popularity throughout the United States.

People took the 1979 gas crisis as a stern warning of tougher times ahead, and began to curtail their driving. And Americans consumed seven percent less gasoline in the summer of 1980 than the year before. Consumers are now anxious to use less gasoline to go to where they want and, once there, they don't want to use any gasoline at all.

Certain leisure destinations fulfill these needs on the part of consumers: a family can travel to a large amusement complex, remain there for the day and find all they want, including food; a couple can attend an afternoon of horseracing or a baseball game close to home and eat there as well; a group can go to see one of the huge theme parks now scattered all over the United States and spend days doing whatever they want without moving their cars.

But the energy problems could work against the leisure market as well: people must be assured of gasoline availability in order to spend the time and use the gas required to

Leisure Market: Foodservice Sales

1978: $2,007,000,000 +11.8% Sales Growth 1979: $2,225,000,000 +10.9% Sales Growth

1984: $3,904,000,000 — +11.9% Sales Growth Compound Annual; 2.4% Real Growth Compound Annual

	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Places for special events/seasonal recreation	1,350	500	11.8	1,490	552	10.3			
Drive-in movie theaters	146	48	14.6	164	54	12.6			
Bowling lanes	411	168	12.6	465	190	13.2			
Sporting and recreational camps	100	60	5.5	106	64	6.0			
Total	2,007	776	11.8	2,225	860	10.9	3,904	11.9	2.4

reach their leisure-time destination. Many segments of the leisure market encountered trouble during the gas crunch of 1979 for precisely that reason. But surveys show that it is availability and not price that significantly affects the consumer's travel, entertainment and vacation plans. If gasoline remains plentiful, the leisure segment of the foodservice industry should be able to maintain its momentum in sales, profits and traffic counts by targeting their advertising and promotional efforts at the local customer.

Near-in (located close to major metropolitan areas) leisure market operations are now doing the best. Although some of the larger national parks in the West provide everything a vacationing family could want to do and see, they are too far away from large population centers and therefore require too much gasoline to reach. It is areas like the Berkshires of western Massachusetts (with proximity to the New York City, Boston and Albany metro markets) and the Catskills, within easy driving distance of New York City, which are reaping the benefits of near-in leisure travel.

Knott's Berry Farm of Anaheim, California, is also in such a position, and is increasingly capitalizing on its location in its marketing and positioning plans. It is reachable by much of southern California's population in a little over an hour's drive time. Knott's, over the past two years, has remodeled many parts of the park, added new rides and attractions, began offering live entertainment and changed its marketing approach to capture a larger share of the near-in population.

"We've been concentrating on the local southern California market, especially since the problems of 1979," says Ken Knott, head of foodservice. "We were hurt badly last year and since then have added more local TV, radio and print advertising, more billboards throughout southern California and have generally tried to make ourselves more attractive to a market that doesn't have to travel as far to reach us."

One of the new facilities at Cypress Gardens is a salad bar.

Cypress Gardens of Florida also has embarked on an ambitious expansion program, the fruits of which are just becoming noticeable. Foodservice sales at Cypress Gardens are running 50 to 60 percent higher this year than last, but 1979 figures were depressed. The expansion of the facilities—coupled with a new marketing program and a large increase in the number of seats in the dining rooms—has boosted 1980 sales as well.

According to David Poore, director of foodservice, three new foodservice operations have greatly improved the outlook for Cypress.

The 1,000-seat Garden Plaza, features five separate shops offering a variety of fast foods: pizza, chicken, burgers, deli and a salad bar are all available.

Another 485-seat operation, County Fare, boasts 10 different types of fast food.

In addition, Cypress Gardens opened a series of juice units throughout the park which feature freshly squeezed juices and iced tea. "We started these units to take advantage of the trend toward natural foods and drinks," says Poore. The foodservice department at Cypress Gardens has also concentrated on garnering a piece of the lucrative Florida convention and banquet business for the first time because of the availability of the new facilities.

Poore is also experimenting with multi-tiered menu pricing, with most menus offering both a la carte items as well as complete dinners allowing diners to "trade up or spend as little as they wish," according to Poore.

Lee White, director of the food and beverage department at Opryland, USA, in Nashville, Tennessee, also watches labor costs very closely: "We keep track of overall park attendance and the estimates, aligning the amount of labor hours required to the numbers we expect." At Opryland there are two major sit-down restaurants, seven fast food operations and five buffeterias. Due to the severe heat wave this summer, attendance was down at Opryland but White is optimistic that traffic will pick up in the near future and continue to grow over the long run: "If the economy gets back into shape, I think we'll be one of the first to feel the effects," he says. The average attendee, of which there are 100,000 on a summer Saturday, spends $3.85 on food during his stay at Opryland. "We're attempting to keep our menu prices in line," says White, "yet still increase operating profits. It's not easy."

It's not easy in the leisure market because it is highly volatile. But the market should continue to grow as the economy returns to a healthy point and people begin to plan trips and vacations once again. When they do start planning, it will be the easy-to-reach, fun activities that they will choose.

The Transportation Market

ARA's new restaurant at the Rochester/Monroe County Airport is a dramatic departure for airport dining. An exclusive wine list and

tar of the Restaurant Growth Index last year, the transportation market remains the growth leader although its five-year prediction is down from last year's stellar heights. The compound annual growth in the transportation segment was listed last year at 13.8 percent but this year it is 11.0 percent. A number of factors have impacted negatively on the market in the past year, but it is expected to recover relatively quickly and can look forward to the highest real percentage of compounded annual growth (2.6 percent) of any segment in the 1980 RGI.

The biggest difficulty facing the transportation segment is fuel costs.

The cost of a gallon of jet fuel shot up to 87 cents in summer of 1980 from 40 cents in early 1979, more than doubling operating costs for airlines. United, the nation's largest air carrier, suffered a $46.7 million 1980 second quarter operating loss, while American flew $45.3 million into the red. Only Delta, US Air, some other regional carriers and commuter airlines are currently making any money.

In addition, the recession has hurt both tourist and business travel, forcing down by four percent the amount of passenger traffic in June of 1980, compared to last year. The major United States carriers are currently involved in price wars on many popular domestic routes, including New York City to California and New York City to Miami.

The Airline Deregulation Act of 1978 has also led to many of the current difficulties. As airlines moved out of approximately 100 unprofitable airports in order to concentrate on the money routes, competition on those routes led to discount fares and startling losses in early 1980.

All of these factors have affected the in-flight and airport foodservice business, making 1980 a very difficult year. But the long-range prognosis remains strong: As deregulation irons itself out and the recession eases, people can be expected to return to air travel.

"The decrease in enplanements has obviously impacted negatively on our business," says Everett Till, president of ARA's Aero Enterprises, responsible for foodservice in 20 United States terminals and some in-flight programs. "We've cut back on food costs everywhere, and, as far as labor is concerned, we've always operated very close to the bone."

In order to attract the people who are moving through airports, Aero Enterprises has converted many facilities to "buffeteria" layouts—a combination of cafeteria-style foodservice with a very wide assortment of foods. "We maintain table service at certain times of the day," says Till, "And we always have porter service to keep things clean, but we're definitely moving toward more self-service."

Till plans to inaugurate a new concept for airport foodservice at Aero's new Philadelphia airport facilities. The unit, to be known as "Naturally," will feature a variety of natural and healthy foods and drinks. "We want to capitalize on the trends we see in the restaurant industry," says Till.

Eugene J. Sullivan, vice president and general manager of airport terminal operations for Dobb's Houses, Inc., also notes the move to more self-service in airport feeding operations. "We just can't keep passing on the cost of inflation to the consumer any longer," he says. "We have to find more productive ways to save costs, and self-service is one of the answers to the problem."

Dobb's House runs foodservice facilities at 24 airports, many of them located in the South, Southwest and Southeast. "We are definitely experiencing lower customer counts in many airports due to the decrease in air travelers," says Sullivan, "But some—such as the Miami facilities—are doing well due to the influx of foreign travelers to the United States, especially Florida."

Dobb's House is currently building facilities at the new Atlanta airport, and will be including dining areas beyond airport security points for the first time. "Most airports were built before intense airport security became a way of life," says Sullivan, "So there are no facilities beyond those points. It will be a big plus for us to be able to provide

complete menu is offered.

Transportation Market: Foodservice Sales

1978: $1,501,000,000 +14.5% Sales Growth				1979: $1,725,000,000 +14.9% Sales Growth				
1984: $2,912,000,000 — +11.0% Sales Growth Compound Annual; 2.6% Real Growth Compound Annual								
	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Air & rail (in transit)	788	390	15.2	920	455	16.8			
Terminal facilities	388	144	15.1	454	168	17.0			
Highway (interstate)	236	87	12.4	250	92	5.9			
Passenger & Cargo liners	89	49	12.4	101	56	13.5			
Total	1,501	670	14.5	1,725	771	14.9	2,912	11.0	2.6

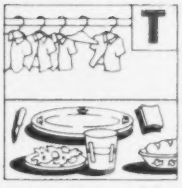
service in the gate areas in Atlanta, because that airport handles a great many passengers who are plane-hopping rather than stopping."

To service these food facilities—which will be located in the terminal wings two stories above ground—Dobb's House designed a truck similar to those which service planes. All food will be prepared in a central commissary over one mile from the terminal and then trucked to Dobb's House's 26 units. "The system will be great for both us and the air traveler," says Sullivan.

Short-term, the transportation market still has some tough times ahead, but it should pull out of its current difficulties. And it should continue as the premiere growth market of the early 1980s.

The spacious and comfortable cocktail lounge in ARA's Rochester facility attracts local patrons as well as travelers.

The Retail Market



The retail foodservice market continues to grow in leaps and bounds as it constantly searches for new ideas to attract customers and boost sales. The "tea room," for so long a familiar fixture in department stores, is becoming a thing of the past. It is being replaced by trendy self-service facilities which help to generate traffic and boost sales store-wide.

Retail foodservice directors are heeding the call of the separate eating and drinking place segment of the restaurant industry and turning to new concepts. Primary among these are new healthy food installations, fast food facilities and snack bars featuring such items as vegetables, fruits, yogurt and chocolate chip cookies. Retail foodservice floor space is being remodeled across the country to accomodate these new ideas. Often, smaller parts of older facilities are being remodeled to keep construction costs down yet still provide new experiences for the retail shopper.

The Lazarus Department Store of Columbus, Ohio, a division of Federated Department Stores, provides a perfect example of changing retail foodservice fashions. Foodservice Director Walt Lindeboom has been hard at work over the last year inaugurating facilities with new menus meant to attract both the traditional retail shopper and off-street patrons who may never have considered dining in a retail foodservice facility before.

One of Lindeboom's new concepts is The Wine Pub, a part of the Columbus store's dining facility, called The Chintz Room. It has been converted to serve "The Vintner's Buffet," a selection of cheeses, meats and salads for $3.75. Customers help themselves from a buffet area, but waitress service is provided for wine by the glass.

Another innovative facility is the Sub Works, located on the ground floor of this downtown store and visible from the street. "People passing by can see the sandwiches being made. It's a perfect merchandising tool," says Lindeboom.

Retail foodservice directors are experiencing more pressure from store executives to produce revenue, profit and increased customer counts. "Foodservice operations take up floor space and if we don't produce, they can always use the space to sell more jeans. Foodservice is no longer considered a 'necessary evil.' We must produce," points out William R. Curtis, foodservice director for

Retail Markets: Foodservice

1978: $3,133,000,000 +8.5% Sales Growth | **1979: $3,417,000,000 +9.1% Sales Growth**

1984: $5,520,000,000 — **+10.1% Sales Growth Compound Annual**; **0.7% Real Growth Compound Annual**

	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Department stores	938	375	8.8	1,019	407	8.6	1,687	10.6	1.2
Variety and general merchandise stores	668	260	8.4	722	281	8.1	1,143	9.6	0.3
Drug and proprietary stores	559	212	6.9	598	227	7.0	780	5.4	-3.5
*Other specialized retail stores (including food outlets)	968	352	9.2	1,078	392	11.4	1,910	12.1	2.6
Total	3,133	1,199	8.5	3,417	1,307	9.1	5,520	10.1	0.7

*Other specialized retail stores include: Food stores including grocery and convenience, gasoline service stations and misc. retailers (liquor, cigar, etc.)

Associated Dry Goods.

But, by the same token, retail foodservice directors feel their departments are being taken far more seriously by store executives who are now receptive to new foodservice concepts. "We're not viewed as just a customer service anymore," says Connie Klier, manager of foodservice for Woodward and Lothrop in Washington, D.C. "Retail store management respects us and relations with them have improved tremendously over the past three or four years. We're expected to turn a profit now--not an outlandish one—but we're treated the same as any other department."

Klier's innovations in the main Washington store include the "Eatcetra" facility, a combination of three counters, each serving a different type of fast food. Located in the Junior's Department, as are many innovative foodservice facilities in department stores, Klier reports a "tremendous" customer response. An arcade linking Woodward and Lothrop and the new Washington Metro subway system will open in September a store selling: "Our very own chocolate chip cookie—the finest in Washington," claims Klier.

Other retail foodservice directors report an increased interest in their departments on the part of retail management. Jerry Rozak, director of foodservice for the Chicago-based Marshall Field chain, says: "We're under more pressure to attract customers because management now realizes the importance of foodservice. Field's has always been big on food, but now we stand a better chance in terms of budgeting, remodeling and advertising."

Rozak has introduced new concepts to attract the customers and generate the revenues store executives are coming to expect. "We've moved to more self-service, like salad and soup bars," reports Rozak. In addition, a hamburger "topping bar" has become very popular in Narcissus, a restaurant in one of Marshall Field's downtown stores. After customers receive their burgers from waitresses, they can go up to a bar at which they can add cheese sauce, mushrooms, grilled onions, relishes and other toppings. "It's only a few months old, but the response has been so positive that we're already considering adding the concept in some of our other stores," says Rozak.

Another way for retail foodservice directors to boost revenues and customer counts has been through the use of tie-ins with other departments and store-wide promotional activities.

At Marshall Field, an Irish promotion is planned for early fall during which an Irish menu will be introduced, an Irish pub will be added, and all foodservice facilities will play as important a role as other departments in the store-wide promotion.

The foodservice divisions of retail department stores are going and growing with the times. The market should continue to expand as foodservice divisions are taken more seriously by store executives and are recognized for what they are: traffic builders which are an integral part of any fashionable retail store.

The fashionable Soho Charcuterie opened a restaurant in Ann Taylor's 57th Street store in Manhattan.

The Business/Industrial Market

Business and industrial feeders are facing many of the same problems being confronted by the rest of the industry: high labor costs, increasing food prices and customer resistance to higher menu prices.

In addition, the difficulty of unemployment in automotive and auto-related industries, which is expected to spread to numerous other industries throughout the economy, is affecting the business and industrial market.

But, through a combination of factors: good employee relations, concern with eating right, and saving disposable income, and employees' desire to remain on-premises during meal periods to conserve energy and time—the business and industrial feeding segment is expected to remain healthy over the long run.

Business and industrial caterers report a renewed interest on the client's part for quality foodservice. They want to keep employees on the premises during meal periods, in part because of the productivity losses resulting from departure and arrival, travel time and disruption of worker schedules. Businesses are also interested in providing a healthy, quality meal for their employees in order to maintain good relations. Feeders in this segment have responded to client wishes with major efforts to make dining in the company cafeteria more exciting and rewarding for patrons.

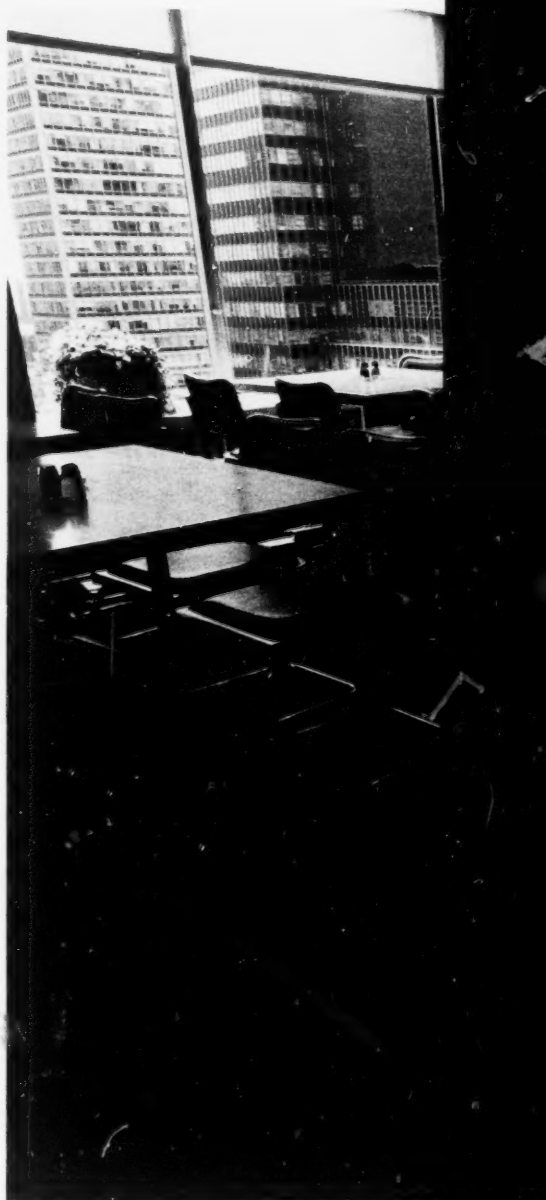
"I think the generally poor state of the economy is working in our favor," says Jack Galione, president of Corporate Food Services, a Manhattan-based company providing foodservice to white collar and executive dining rooms. "We do consider the outside competition but we feel the value we put out for the price is extremely high. As times get tougher, more people are staying in the office for their noon meal and are eating more because of the price/value perception. We're serving more hot entrees at lunch because I think people are eating their main meal at that time of the day and are eating lighter at home at night."

Other business and industrial feeders note that new efforts at merchandising to make in-house feeding facilities more attractive to an ever-changing population are underway.

To attract the traditional brown-bagger, Richard Ysmael, corporate director of employee services for Motorola has begun a promotional campaign called "What's in your bag?" "We're trying to demonstrate that we can provide a better meal to the brown-bagger for less trouble than he is accustomed to," says Ysmael. Motorola has also begun promotional activities to attract breakfast business in hopes of increasing the sales percentage to 15 percent from its current 10 percent of total daily sales.

Ralph Pica, president of Saga's business and industrial division, reports that "Client needs are changing—we've become much more retail oriented than institutional. We're moving away from the heavy meat and potato emphasis to various foods which are lighter and easier to prepare and serve."

Greyhound Food Management is



Corporate Food Services provides food service

trying to stay one step ahead of the competition by anticipating what it sees as dramatic changes in this market in the near future. "We believe that in three to five years an evolutionary change will occur in industrial feeding," says John Teets, president of Greyhound Food Management. "Historically, companies have been oriented to large cafeterias. But, because of the mix of younger employees who have been brought up on fast food and are fast food oriented, they want that at work as well—quick service in a relaxing atmosphere."

Greyhound Food Management has developed its Eatin' Easy program to capitalize on this trend. In an Eatin' Easy installation, signs direct diners to one of three different food areas: Food Fare for the heavy eater, Quick Check for the snacker and Burger Express for people interested in traditional fast food. All are located behind one main counter with three separate cashiers to facilitate ordering and service.

Other new types of service and food are also becoming popular in the business and industrial segment. Galione of Corporate Food Services reports the introduction of Antipasto bars which feature a wide variety of meats, cheeses, greens and dressings. Customers create their own concoctions and pay for them by the ounce. "It gives us built-in portion control, reduces waste and helps trim food costs," according to Galione. Corporate plans to expand "by the ounce" sales to other areas, including french fries, salads and vegetables.

Kay Stammers, corporate food service manager for Kodak in Rochester, New York is currently building a cafeteria which will feature totally portable equipment. "Tastes are changing too quickly," says Stammers, "and we don't want to have to tear everything down in a few years. The portable equipment will allow us to be more flexible and respond to customer needs more quickly."

Stammers agrees that employees are eating in-plant more frequently and are taking their major meal of the day on-premises because of the perceived value. She has also introduced salad bars and the sale of submarine sandwiches by the inch (at 20 cents per inch), resulting in better food costs and less waste. The submarine "by the inch" sale

The new Cafe IV at Mutual of Omaha is serviced by Saga. It seats 1,000 under the largest, insulated glass dome in the U.S.

has generated a "tremendous" response, according to Stammers.

Another way of saving money which has met with both good client and employee acceptance is the use of central commissaries to supply satellite feeding areas.

At Greyhound facilities, many foods are prepared in central areas and sent to outer feeding installations. Items such as hamburgers are prepared in the satellite areas, but central commissaries are used for the preparation of appropriate foods.

"We've gone back to total scratch kitchens" to cook most items which then travel to satellite facilities, resulting in no duplication of equipment or labor," says Stammers of Kodak.

Motorola's Ysmael reports a cutback in labor costs through voluntary time off by full-time foodservice personnel and reduced operating hours.

But Galione sees a basic problem for the business and industrial segment that must be faced: "Contractors and in-house feeders have to raise prices. The clients have raised their own product/service prices plenty while our prices have remained fixed. They want quality foodservice for their employees, yet they continue to ask us to hold the line on our prices. Well, we're running out of things we can trim. Ultimately, I see this as self-destructive."

Galione's assessment is echoed by other business and industrial feeders, but management firms are reluctant to raise prices because of intense competition within the market. And in-house feeders don't scream too loudly for fear of management calling in an outside caterer. The fact that clients demand quality and value for their employees, yet don't want to pay more, has forced the business and industrial segment to look long and hard at itself in order to trim even further to remain within budgets or maintain profit margins. Many feeders report that they have cut personnel and service to the bone in the struggle to preserve quality food at reasonable prices.

The current unemployment rate is a constant worry for business and industrial feeders. If employment continues to decline, the pinch will be felt soon.

"We haven't been affected yet," reports Ysmael, "but we're not directly tied into the steel or automotive industries. But if those industries continue their downward trend, we'll soon be seeing problems in other segments of the economy and then everyone will be hurt. Hopefully, the economy will recover before we reach that point.

Another harbinger of potentially rough times ahead is the fact that food on the job has become a "quality of life" issue for the unions. Food quality and menu prices continue to crop up in the demands of organized labor during contract discussion time.

In the future, business and industry feeders may hear more demands for even better food at even lower prices. Newer and more innovative approaches will have to be tested and installed, especially if unemployment continues to rise.

Business and Industry: Foodservice Sales

1978: $5,871,000,000 +10.9% Sales Growth	1979: $6,317,000,000 +7.6% Sales Growth

1984: $10,188,000,000 — +10.0% Sales Growth Compound Annual; 0.7% Real Growth Compound Annual

	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Contract feeding in plants (cafeterias primarily)	1,795	836	11.5%	1,938	902	8.0	3,129	10.1	0.7
Contract feeding in business offices	477	222	13.0	527	245	10.5	912	11.6	2.1
Internal feeding—plants and business	1,167	571	10.8	1,254	614	7.4	1,936	9.1	−0.2
Waterborne employees	207	125	7.8	222	134	7.2	288	5.3	−2.2
Mobile on-street catering	384	135	15.7	415	146	8.1	725	11.8	2.3
Food vending machines (excluding soft drinks and candy)	1,841	626	9.4	1,961	667	6.5	3,198	10.3	0.9
U.S. Defense personnel		1,409			1,531	8.7			
Food furnished foodservice employees		2,711			3,023	11.5			
Total	5,871	6,635	10.9	6,317	7,262	7.6	10,188	10.0	0.7

The Health Care Market

The health care market, in terms of sales, is the second largest industry segment, trailing only the separate eating and drinking place segment. Although it grew by 9.6 percent in 1978 over 1977, five-year projections call for only a 0.2 percent real compound annual growth rate.

The health care market is beset by difficulties that many other segments do not face. The cost of medical care in the United States is said to be increasing even faster than the economy as a whole—some estimates put inflation in medical services at 15 percent a year, well over the general rate. The labor factor is becoming increasingly burdensome in hospitals and nursing homes, the cost of new technologies is astronomical and health care institutions must be able to provide increasingly sophisticated facilities and services in order to remain competitive in an ever widening market. But the bottom line, as far as the health care segment of the foodservice industry is concerned, is that something has to give and very often it is foodservice.

Although basic necessities and services must be provided for patients, employee foodservice is often cut back. Rare is the health care institution which is able to go the extra mile in foodservice for its patients and employees. Many hospital administrators look to the foodservice department as the first to be chopped and trimmed at budget time. The effects of this attitude are being felt in the health care foodservice market, and many health care foodservice managers feel that the real crunch is yet to come.

St. Mary's Hospital in Philadelphia recently eliminated it's employee's full-service cafeteria, cut breakfast and now offers employees one special a day on a "take it or leave it" basis. Vending machines were introduced and labor costs were trimmed by 75 percent as a result of the cutbacks.

One hospital which does go the extra mile for its patients and employees is the Albert Einstein Medical Center, Northern Division, in Philadelphia. According to Steve Levitsky, associate general director for operations: "Einstein patients are on a five-meal-a-day program. In addition to the three regular meals, we offer an earlier continental breakfast and a mid-afternoon snack. This increases our labor costs by about 10 percent, but it's well worth it from our point of view. We've even received letters from former patients praising the food! Our costs per patient per day for food is about $12.50, which is high, but food is one of the things that either brings patients and doctors in or keeps them away."

Another innovation at Einstein is the "Taste of Philadelphia" pro-

Health Care Market: Foodservice Sales

1978: $8,105,000,000 +9.3% Sales Growth				1979: $8,887,000,000 +9.6% Sales Growth					
1984: $13,195,000,000 — +8.2% Sales Growth Compound Annual; 0.2% Real Growth Compound Annual									
	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Hospital-internal	5,437	2,466	8.5	5,937	2,693	9.2	8,596	7.7	−0.2
Hospital/Nursing home-contract	678	27	10.1	742	296	9.4	1,147	9.1	1.0
Other institutions for specialized care including nursing and old age homes, orphanages, etc.	1,990	1,278	11.3	2,208	1,418	11.0	3,452	9.3	1.3
Total	8,105	4,015	9.3	8,887	4,407	9.6	13,195	8.2	0.2

gram. Every six weeks, the chef and staff of a local Philadelphia restaurant come in to the hospital and prepare one of the restaurant's specialties. The special menu can be purchased a la carte or as a whole dinner by employees and is offered to all patients who are on non-restricted diets. The program, now in it's second year, has met with tremendous response from both patients and employees. Philadelphia restaurants which have already participated include The Frog, Wildflowers and Chestnut Hill Hotel.

Einstein is currently developing plans for a new building which is expected to be ready in 2½ years. "We'll keep the same kitchen we have now and transport the food to the new building by hand-truck," says Levitsky. "We're working on a way of getting the food to all patients in less than nine minutes."

Sarah Maxwell, vice president of ARA's Hospital Food Management, feels the problem of maintaining quality in the face of escalating costs has been the major challenge for her firm's 375-plus operations during the past year. "It's a constant battle to contain costs with inflation impacting on both food and labor and to improve quality at the same time," she says. "Because of the stiffer competition between health care institutions, we try to help our hospital clients by offering top quality food. I believe we're succeeding, but we have to remain on top of everything all the time." Numerous other health care foodservice managers share this view.

Maxwell and her staff have been concentrating on promoting the new government dietary goals to hospital patients and staff. "It's unfortunate that it takes a stay in the hospital to make people aware of the goals, but it's great if they learn something while they're here and it improves their eating and drinking habits," says Maxwell.

Innovative ideas to help save costs and maintain quality are the most important factors operating in the health care market today. The market is expected to show both near and long term growth, but at a slower rate than the rest of the foodservice market.

At Medical City, Dallas, managed by Humana, Inc. of Louisville, KY, new parents are served a special meal with champagne. Below, The Frog *restaurant workers prepare food for the Albert Einstein Northern Division "Taste of Philadelphia" program.*

The Student Market

In the student market, growth is running at approximately the same rate (8.4 percent in 1978, 8.0 percent in 1979) as it was last year. In the elementary and high school segments, inflation and government support continue to remain major difficulties. The push to balance budgets and trim expenses, more popular now than ever, often begins with such programs as government sponsored student feeding reimbursements.

ARA's Mary Beth Crimmins, vice president, school services predicts: "The controversy of budget-cutting centered on child nutrition programs will continue. It looks now as if reimbursements will be decreased by 2.5 cents per pupil per meal for the 1980-81 school year, but that could change. The number of school districts serviced by ARA has increased over the last year, I think indicating that they are turning in ever greater numbers to contract feeders to handle these increasing difficulties."

To attract new clients and provide extra service for current ones, ARA has inaugurated a Nutrition Education Program. Aimed at second and third graders, because children are then "at an age when habits are formed and nutrition education can have its greatest impact," according to Crimmins, the program is designed to increase awareness of vegetables and their importance in a child's diet. Using puppets outfitted as vegetables, two 15-minute videotapes follow their adventures, showing vegetables to be interesting, good and fun foods. The videotapes are presented in classrooms in conjunction with a teacher's guide, although ARA foodservice directors handle most presentations. "It has met with tremendous success already," reports Crimmins.

In college and university foodservice operations, sales growth proceeded at an eight percent rate for internal foodservices and nine percent for contract foodservice in 1979.

The emphasis is on new ideas to attract new customers and increase student participation.

Bill Hickey, foodservice director at the University of Illinois at Chicago Circle, recently redesigned and remodeled the student snack bar on the commuter campus and has watched customer counts skyrocket as a result. Chicago Circle installed 11 booths, each offering a different type of quickly prepared and served food, including deli specialties, Mexican food, hot dogs,

Student Market: Foodservice Sales

1978: $5,213,000,000 +8.4% Sales Growth			1979: $5,630,000,000 +8.0% Sales Growth					
1984: $8,173,000,000 — +7.7% Sales Growth Compound Annual; −0.2% Real Growth Compound Annual								
	1978 Sales ($000,000)	1978 Purchases ($000,000)	1978 vs 1977 % Growth	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1984 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
School-internal (public, parochial, elementary & secondary)	1,938*	2,676**	8.1	2,083	2,876	7.5	2,850	6.5	−1.4
School-contract	527	248	9.2	570	268	8.2	849	8.3	0.3
Colleges, universities-internal	1,852	952	8.4	2,000	1,028	8.0	2,957	8.1	0.2
Colleges and universities-contract	896	317	8.9	977	345	9.0	1,517	9.2	1.2
Total	5,213	4,193	8.4	5,630	4,517	8.0	8,173	7.7	−0.2

* *Actual cash receipts from children reported by states to USDA (plus parochial and other private schools). Sales are lower than purchases because of subsidy programs.*

** *Not including $775,350,000 worth of commodities and milk, a 13.9% increase from 1977.*

The remodeled snack bar at the University of Illinois at Chicago Circle offers 11 different types of food.

The dining area sometimes becomes a performance center for jazz music and poetry readings at Chicago Circle.

hamburgers and fried chicken. Sales and customer counts are up, and Hickey claims that student response has been overwhelming. "They aren't leaving campus anymore to get the kinds of food they want," says Hickey.

In addition, the Chicago Circle facility—in conjunction with the campus programming department—began a series of weekday afternoon and weekend entertainment programs to attract business. Programs include jazz, poetry readings and other special events. "The snack facility was in bad shape a year ago," says Hickey, "But the combination of the food concepts, entertainment during traditionally slow periods and strict management controls have turned things around."

Nutritional information and varied dining concepts have proven to be big traffic builders in the university segment.

At Stanford University in Palo Alto, California, menus now disclose caloric value, fat content and cholesterol ratings.

13th Annual Restaurant Growth Index

by Robert M. Katz

The 1970s were a period of change in the foodservice industry. The 1980s will also see changes, brought about in large part by a substantial shift in the demographic characteristics of our country. The effects of these shifts are far reaching and dramatic, and will have a substantial impact on the foodservice industry.

The first step in preparing for the future is to look at it. In *Table 1,* we have documented how the population matrix is expected to shift by 1990.

The first item to note is the tremendous increase in the 35-44 age group, which will skyrocket from 24.7 million persons in 1978 to 37.3 million in 1990—an increase of 51 percent in 12 years: Certainly, one of the more significant marketing shifts that will occur.

The next largest increase is in the 65-and-over age group, which will grow by 23 percent. All of us who pay FICA (Social Security) taxes, will readily grasp the implication of that statistic. The 1930 Census reported that there were 6.6 million Americans 65 and over, representing 5.4 percent of the total population. By 1990, the 65-and-over group will constitute 12.3 percent of the total, some 30 million by the end of the decade.

Another big gain will be scored by the 25-34 age group, which will increase by 19 percent. It was the largest group in 1978, with 34.4 million and will continue to be the largest group in 1990 with 41.0 million. Not too surprising to demographers is the fact that the 12-17 and 18-24 age groups will both lose population: 16 percent and 13 percent respectively. The size of both the 45-54 and the 55-64 age groups will remain relatively stable.

Mr. Katz is vice president of Market Statistics, a division of Bill Communications, Inc. All data are copyrighted by *Restaurant Business* Magazine and *Sales and Marketing Management* Magazine and further reproduction is forbidden.

Changes will undoubtedly be necessary in the formulation of promotional campaigns. Children will continue to flock into restaurants featuring magicians and puppeteers, but what about the largest group of all, the 35-44 year olds? Characterized by social mobility, high income, teen-age children and lots of leisure, this group provides the greatest potential for an increase in eating out. Creating advertising, both in print and radio, directed to the 35-44 group might emphasize the pleasures of eating out, the variety of food that is available, the efficient service and relaxation. The new demographics will help lead marketers in the right direction.

Where feasible, thought could be given to providing some live or taped entertainment, whether it be some music or special short features shown on TV monitors (using video cassette cartridges). Families who eat out frequently may well enjoy spending more time in restaurants that do provide some form of limited entertainment. The appointments in a restaurant, as well as the seating arrangements and lighting, should be conducive to an intimate atmosphere. In certain closely knit neighborhoods, foodservice establishments could promote better relationships and more business by sponsoring bowling leagues, little league games, or perhaps adult softball contests. Again, these decisions should be influenced by the shifting age patterns of Americans.

A unique field for promotion is the over-65 group, especially in areas with a lot of seniors. Local restaurants can issue special discount cards to senior citizens residing in the neighborhood. This card would stipulate the days of the week and hours of the day when the card would be valid, let's say, for a 10 percent discount on any item on the menu. Alternatively, the

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New data

Readers will note several changes in the format of this year's RGI report. There are three additional columns designed to further aid marketers and analysts. The columns are: Population, Percent of United States Population, and Average Household Size. The Population column will allow a basis for determining per capita sales ratios within a market. The percent of United States population indicates the relative size of each market as a share of the United States. The Average Household size is a key marketing variable for planning.

Starting with this year's RGI, we will be basing our various retail sales estimates on the just released 1977 Census of Retail Trade. The 1977 Census has improved the definition of retail sales. This is the case since sales tax has been removed from the definition thus making data from a sales tax state comparable to data from a non-sales tax state.

This year's report also includes an RGI overview of the nine major census regions.

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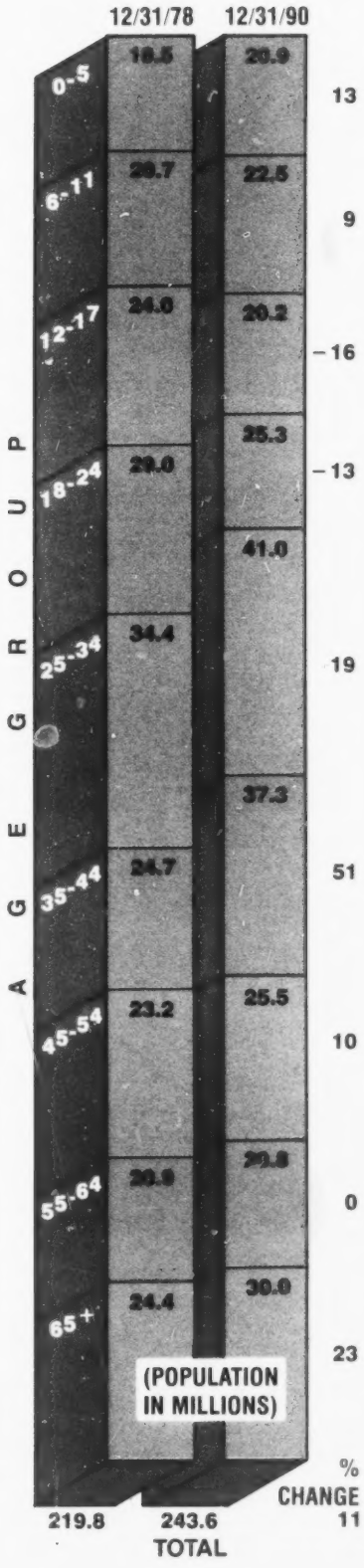
TABLE I
Population Projections by Age Group for the U.S.



Source: Sales & Marketing Management's 1980 Forecaster's Handbook

restaurant can feature a daily special for the holders of these cards, at a stated price. Since older people do not eat as much as younger persons, a special with modest servings could well be a popular feature.

Closely linked with the many demographic changes that will take place in the 1980s, is the prospect of the increasing popularity of regional food favorities. Such offerings may include spicy southwestern specialties, New Orleans Creole, and other uniquely regional fare. These, and the other suggestions mentioned previously, are sure to be thoroughly tested in the '80s by the major marketers.

Technology and innovation helped encourage the growth and expansion of the foodservice industry. Not only does technology allow for the convenience of quick service, but it has also led to economical prices and high sales volume. This, of course, has been the basis of the well-run, efficient and profitable chains of today. The '80s will see technology and innovation on the rise.

The decade past

Now that we have discussed the future, let's see what happened in the 1970s.

Table 2 illustrates the number of establishments engaged in selling prepared food in 1972 compared to 1977. There were 28,829 *net* increases in the number of eating places. Fast food places accounted for 19,507 of the 28,829 total increase, or over 67 percent. Net increases in restaurant establishments represented over 21 percent of the change from 1972 to 1977. There are 3,141 counties in the United States. Almost two-thirds of the net change in eating places occured in the largest 250 counties. For the top 250 counties, the average net change was 75 additional establishments. The remaining counties each gained an average of 3.5 net establishments during the five-year period, 1972-1977.

Table 3 highlights the average increase in total sales that different types of eating places experienced from 1972 to 1977. The average growth was 63 percent for eating places per establishment, and 52 percent for all retail establishments. As the table indicates, only two kinds of eating establishments did substantially better than the norm.

The two leading segments were fast food stores, and ice cream and frozen custard stands, with sales per establishment increases of 80 and 79 percent, respectively between 1972 and 1977. During this period, both segments posted tremendous net increases in number of establishments. The number of fast food places increased by 26.8 percent, and ice cream and frozen custard stands by 49.3 percent. Yet even with these unit increases, the average sales growth per establishment continued unabated. That says a lot about the vigor and popularity of these establishments in the 1970s.

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Problems ahead

Our outlook for the 1980s would not be completely realistic without a few caveats. Unless wages keep up with inflation (presently, a rather dim prospect), there could well be a growing problem of price resistance. At some time soon, the average cost of eating in a fast food establishment for a family of three may approach $10. And psychological resistance can be expected if the bill goes to $12 or $13.

The effects of inflation on purchasing power may force consumers to eat at home more often. While gasoline is plentiful at the present time (last year's gas lines and odd/even numbers seem like a bad dream now), there is no assurance that the supplies of gasoline will not be curtailed or that the price will not forge ahead to $2 per gallon or more in the eighties. Such an eventuality, could have major impact on the frequency of traveling to dine out.

The key to the survival and growth of the food service industry in the 1980s depends on how eating places go about mitigating the negative factors and how well they succeed in promoting the positive factors. The surest way to do both is to utilize the demographics in a marketing mix which will attract the *greatest* number of people to continue eating away from home.

The 1970s were dynamic years for the foodservice industry. Not only did stores of all types open but they flourished. There are many problems to be faced in the 1980s, but the clever and resourceful marketer, armed with current and accurate information, is prepared and eager for the challenge in this very competitive industry.

Definitions

Population:

Updated from the 1970 U.S. Census of Population and Housing, it is an estimate of the number of people living in an area at the end of the year. It includes people living in colleges and hospitals, and armed forces permanently assigned to the area, but excludes tourists and transients. Large changes in group-quarters populations are not projected in these forecasts.

Demographic statistics have been estimated employing a population component procedure. That is, independent county estimates of births, mortality, and migration are generated. These population components are aggregated and either added or subtracted from the appropriate benchmark.

Fertility rates, for example, have been projected at their current rate of change. We assume that the pattern of births will continue its slow but steady rate. Similarly, we have assumed that no major medical advancement will be found over the next few years and that the mortality rates that are in effect today will continue unmodified.

Percent of U.S. Pop.:

A market's share of the total U.S. population.

Household:

A household consists of all the people occupying a single housing unit under 1970 census rules—such as a house, an apartment, a group of rooms, or a single room. The members of a household need not be related, and a single person living alone in a housing unit is also counted as a household.

All persons who are not members of households are regarded as living in group quarters: institutions, college dormitories, military barracks, etc. Caution: Although a county's population total will include all the people in the area, the household total will not do so because it excludes those living in group quarters.

Average Household Size:

Total population divided by the number of households. Depending upon whether it is above or below the U.S. average, it is used as a rough indicator of the relative importance of family-type units or single-person units in a local area. However, the figure can be artificially high in those relatively few counties where there is a disproportionate share of college, military, and other types of institutional population. The people living in such group quarters are part of the population total, but their dwellings are not part of the household total.

Eating and Drinking Places:

Includes establishments selling prepared food and drinks for consumption on or near the premises or for takeout, as well as lunch counters and refreshment

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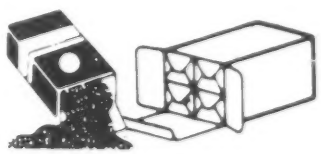
Table 2

Number of Establishments

Kind of Business	1977	1972	1977-1972 Net Change
Eating Places	237,728	208,899	+ 28,829
Restaurants	118,896	112,656	+ 6,240
Fast Food Places	92,357	72,850	+ 19,507
Social Caterers	3,502	3,944	– 442
Cafeterias	7,001	8,162	– 1,161
Contract Feeding	7,836	5,836	+ 2,000
Ice Cream & Frozen Custard Stands	8,136	5,451	+ 2,685



Source: 1977 Census of Retail Trade

stands selling prepared foods and drinks for immediate consumption. Also included are caterers and in-plant food contractors, as well as leased eating and/or drinking concessions in theaters, hotels, amusement parks, etc. Restaurants and lunch counters operated by department stores are classified in General Merchandise Group; those operated by hotels are classified in the Hotels Group.

Eating Places:

Includes retail sales of restaurants and lunch rooms, social caterers, cafeterias, fast food sales, contract feeding and ice cream and frozen custard stands. Excludes drinking place sales.

Restaurants:

Establishments engaged in serving prepared food and beverages selected by the patron from a full menu. Waiter or waitress service is provided and the establishment has seating facilities for at least 15 patrons. These establishments often serve alcoholic beverages. Establishments in which sales of alcoholic beverages for consumption on the premises exceed receipts from sales of prepared foods and nonalcoholic beverages are classified as "Drinking places."

Fast Food:

Establishments primarily selling limited lines of refreshments and prepared food items. Included in this group are establishments which prepare refreshment items such as pizza, barbecued chicken, and hamburgers for consumption either on or near the premises or for "take-home" consumption.

Market Share:

Represents the percent of eating place sales from fast food units or from restaurants. It is indicative of customer preference for these types of establishments in that area.

Restaurant Activity Index (RAI):

The percent of U.S. eating place sales divided by the percent of U.S. food store sales, expressed as an index. An index greater than 100 indicates more than average propensity to eat out rather than at home.

Food Stores:

Establishments selling food primarily for home consumption. The definition embraces grocery stores, meat markets, fish markets, fruit and vegetable markets. Also included are candy, nut, and confectionery stores, dairy product stores, retail bakeries and egg and poultry dealers. Although food store sales include revenue from sales of nongrocery items, they still are most useful in determining how much people spend for food products.

Restaurant Growth Index (RGI):

The weighted percent of U.S. Daytime and Nighttime pop. (DNP), divided by the percent U.S. eating place sales expressed as an index.

The underlying theory behind the RGI is that each market has a certain propensity to eating out. If the demand is met by the supply, an equilibrium exists and the index is 100. If demand exceeds supply—that is, the potential is not being met—the index will exceed 100. And, if the supply exceeds demand, you'll find that the index will fall below 100. The degree to which demand and supply differ is measured in index points.

An index of 110 indicates that one could expect a 10 percent growth in that market, once the appropriate facilities are brought into the supply stream.

However, it is important to understand that RGI is designed as an initial guide—and not the final test—in determining the growth potential of a particular market. Other indices of a market area's potential include: disposable income, number and size of households, age distribution patterns, and ethnic composition—all of which the operator should weigh against his restaurant concept in terms of service level, menu selection, and pricing strategy. *All* the preceding factors must be reviewed to determine a market's growth potential.

Daytime and Nighttime Population (DNP):

This measure includes three separate components—The Daytime population which consists of both (1) the commuting workforce, and (2) transient population, and the Nighttime population which represents (3) the residents in the market.

Television Market:

The TV markets are the American Research Bureau's Areas of Dominant Influence (ADIs). ARB studies each county for its measurable viewing patterns. The hours of viewing accorded each TV station

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Table 3

Sales Per Establishment (with payroll)

Kind of Business	1977	1972	1977-1972 % Growth
Eating Places	$228,857	$140,320	63
Restaurants	239,460	147,820	62
Fast Food Places	211,425	117,195	80
Social Caterers	201,790	168,115	20
Cafeterias	262,970	194,458	35
Contract Feeding	371,504	259,725	43
Ice Cream & Frozen Custard Stands	116,707	65,366	79

Source: 1977 Census of Retail Trade

whose signal reached the county are totalled; then each station's percentage share of total viewing hours is calculated. The market of origin of the TV stations with the largest share of viewing hours becomes the ADI name for that market, and all counties whose largest viewing share is given to stations of that same market of origin are grouped within the ADI. (For its purposes, ARB splits certain counties, treating each portion as if it were a separate county.) Each county, (or portion) is allocated exclusively to a single ADI; thus overlap is eliminated. All of the area of the United States is covered except for Hawaii and part of Alaska.

Standard Metropolitan Statistical Area (SMSA):

Revised criteria by the U.S. Office of Federal Statistical Policy and Standards provide that an SMSA must include either (1) one city with a population of at least 50,000; or (2) one city with a population of at least 25,000, which, when combined with contiguous places having a density of 1,000 or more people per square mile, will have a population of at least 50,000 (provided that the city and contiguous places are in a county or counties with a population of at least 75,000).

A contiguous county is included in an SMSA if at least 75 percent of the resident labor force is nonagricultural, and at least 30 percent of the resident employed workers work in the area. A contiguous county that does not satisfy those requirements will be included if at least 75 percent of the resident labor force is nonagricultural and if it meets at least two criteria of metropolitan character and one criterion of metropolitan integration.

Minimum criteria of character: (1) 25 percent of population is urban; (2) population gain of 15 percent between two most recent decennial censuses; and (3) density of 50 persons per square mile. Minimum criteria of integration: (1) 15 percent of resident employed workers work in the area; (2) 15 percent of the county's employed workers live in the area; and (3) sum of workers commuting to and from the central county or counties is equal to 20 percent of the employed workers living in the county.

SMSAs are defined by the government along county lines except in New England, where towns and cities are the units of definition. The federal government's alternative, but unofficial, New England County Metropolitan Areas, comprised of whole counties rather than cities and towns, are used for those states.

New England County Metropolitan Area (NECMA):

The U.S. Office of Federal Statistical Policy and Standards defines these areas (intentionally not designated as "standard" metro areas) by applying to the New England counties the same criteria used in establishing Standard Metropolitan Statistical Areas (SMSAs) outside New England. While they are not as satisfactory as the New England SMSAs in fulfilling the metropolitan concept (owing to the unique geographic characteristics of the region), they are more convenient for marketers who work with county units and are better suited to the development of demographic estimates. The name of each NECMA is composed of the names of the SMSA central cities that it contains.

Potential Metropolitan Area:

An area not officially designated as a Standard Metropolitan Statistical Area by the U.S. Office of Federal Statistical Policy and Standards, but that Market Statistics, Inc., the research division of Bill Communications that prepares these statistics, estimates comes closest to satisfying the qualifying criteria. Places are considered to meet the requirement of contiguity if they are less than one mile apart, or, where the gap separates populations totalling 50,000 or more, if they are less than two miles apart. No potential metropolitan area falls more than 12 percent short of satisfying all quantitative requirements, and most importantly, each area has a city or group of contiguous or nearly contiguous places with a combined population of at least 44,000.

As the name "potential metropolitan area" implies, *Sales & Marketing Management* so designates those areas because it considers them prime candidates to achieve standard metropolitan area status in the near future. From the marketing point of view, some are even more important than the smaller SMSAs, but have been deprived of official recognition because they do not meet all the requirements of the government. Of the 300 metropolitan areas, 33 are *Sales & Marketing Management* potential metropolitan areas. In the past, 80 percent of the potential areas have eventually received official status as a Standard Metropolitan Statistical Area by the U.S. Office of Federal Statistical Policy and Standards.

County:

The primary political administrative subdivision of a state, the county is widely used for marketing purposes for the following reasons: (1) The range of current available data below the state level is greatest at the county level. (2) Geographic boundaries are rarely altered. (3) Complete national coverage is achieved by adding all counties. (4) *Sales & Marketing Management's* 3,142 county units are manageable buildir blocks for alignment of sales territories. (5) County boundaries are readily identifiable.

For Louisiana, parishes are used in lieu of counties, while Alaska is tabulated by the census division delineated by the Census Bureau as county equivalents. The District of Columbia is treated as a single county unit. In Virginia, all cities are by law independent of counties; hence, the S&MM *Data Service* treats them as county units in themselves. The cities of Baltimore, Md., St. Louis, Mo., and Carson City, Nev., which replaced Ormsby County, are also considered as independent cities by the Census Bureau. In addition, the former Muscogee County, Ga., is administered by the consolidated city-county government of Columbus; hence, that county is listed as Columbus.

RGI Regional Summary

REGION State	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	RAI	RGI
NEW ENGLAND	**12,349.9**	**5.5734**	**2.86**	**4,028,699**	**3,672,104**	**1,114,539**	**30**	**2,006,193**	**55**	**100**	**108**
Connecticut	3,128.2	1.4118	2.86	970,805	883,397	280,896	32	449,410	51	98	116
Maine	1,106.0	0.4991	2.91	298,215	284,269	104,724	37	157,300	55	82	104
Massachusetts	5,787.5	2.6119	2.84	2,066,152	1,863,644	536,078	29	1,021,371	55	108	104
New Hampshire	897.8	0.4051	2.93	288,042	277,298	90,887	33	162,863	59	88	97
Rhode Island	933.1	0.4211	2.88	266,969	235,885	69,439	29	138,157	59	96	116
Vermont	497.3	0.2244	2.87	138,516	127,611	32,515	25	77,092	60	91	129
MIDDLE ATLANTIC	**36,887.3**	**16.6473**	**2.80**	**11,685,002**	**10,006,088**	**3,142,060**	**31**	**5,402,828**	**54**	**90**	**120**
New Jersey	7,341.8	3.3134	2.93	2,567,321	2,084,608	633,700	32	1,147,476	55	84	112
New York	17,770.0	8.0223	2.72	5,679,444	5,051,376	1,452,474	29	2,787,858	55	96	121
Pennsylvania	11,769.5	5.3116	2.84	3,438,237	2,870,104	1,025,886	36	1,467,494	51	85	124
EAST NORTH CENTRAL	**41,418.9**	**18.6924**	**2.89**	**15,273,972**	**13,024,059**	**4,977,607**	**38**	**6,672,318**	**51**	**104**	**95**
Illinois	11,259.3	5.0814	2.83	4,420,405	3,851,676	1,429,268	37	1,982,072	51	117	98
Indiana	5,386.4	2.4308	2.92	1,787,514	1,576,350	697,447	44	704,645	45	103	94
Michigan	9,223.1	4.1624	2.94	3,455,404	2,931,225	1,059,187	36	1,547,121	53	102	89
Ohio	10,811.6	4.8793	2.88	3,720,823	3,261,706	1,345,225	41	1,579,047	48	95	96
Wisconsin	4,738.5	2.1385	2.90	1,889,826	1,403,102	446,480	32	859,433	61	101	97
WEST NORTH CENTRAL	**17,246.7**	**7.7834**	**2.82**	**5,935,594**	**5,077,846**	**1,974,858**	**39**	**2,642,102**	**52**	**104**	**101**
Iowa	2,923.8	1.3196	2.83	981,248	795,202	314,806	40	419,233	53	93	106
Kansas	2,390.9	1.0790	2.74	779,829	722,936	346,104	48	310,140	43	108	94
Minnesota	4,071.8	1.8376	2.90	1,450,409	1,213,958	396,336	33	732,142	60	110	104
Missouri	4,899.3	2.2110	2.77	1,665,207	1,521,757	638,295	42	695,566	46	101	98
Nebraska	1,590.4	0.7177	2.79	569,883	451,161	167,145	37	249,443	55	108	106
North Dakota	688.1	0.3015	3.02	240,692	175,866	55,030	31	108,675	62	107	105
South Dakota	702.4	0.3170	2.91	248,326	196,966	57,142	29	126,903	64	105	96
SOUTH ATLANTIC	**35,339.2**	**15.9486**	**2.84**	**11,584,661**	**10,855,369**	**4,520,207**	**42**	**5,008,851**	**46**	**97**	**97**
Delaware	587.3	0.2650	2.88	180,651	166,598	66,086	40	81,921	49	89	106
District of Columbia	661.5	0.2985	2.38	409,101	384,733	111,618	29	189,673	49	292	118
Florida	8,956.8	4.0422	2.61	3,868,411	3,572,982	1,232,499	34	1,963,005	55	107	88
Georgia	5,166.2	2.3315	2.98	1,550,136	1,472,029	735,748	50	563,115	38	97	96
Maryland	4,183.2	1.8879	2.91	1,474,699	1,311,277	569,689	43	552,986	42	95	95
North Carolina	5,670.3	2.5590	2.93	1,421,615	1,372,914	654,179	48	564,097	41	87	103
South Carolina	2,967.9	1.3394	3.10	741,331	708,620	342,329	48	288,998	41	83	104
Virginia	5,260.9	2.3743	2.95	1,538,520	1,500,992	633,315	42	656,045	44	93	100
West Virginia	1,885.1	0.8508	2.87	400,197	365,224	174,744	48	149,011	41	65	125
EAST SOUTH ATLANTIC	**14,228.6**	**6.4214**	**2.94**	**3,478,971**	**3,291,564**	**1,576,765**	**48**	**1,340,892**	**41**	**80**	**105**
Alabama	3,815.4	1.7219	2.91	866,534	830,917	405,830	49	313,021	38	80	107
Kentucky	3,554.3	1.6040	2.96	939,456	872,401	432,283	50	356,076	41	79	100
Mississippi	2,433.6	1.0983	3.12	488,723	465,623	240,358	52	165,476	36	64	110
Tennessee	4,425.3	1.9972	2.85	1,184,258	1,122,623	498,294	44	506,319	45	88	106
WEST SOUTH CENTRAL	**22,682.9**	**10.2367**	**2.89**	**7,423,270**	**6,817,407**	**3,033,771**	**45**	**2,818,618**	**41**	**92**	**93**
Arkansas	2,221.8	1.0027	2.82	472,896	452,236	222,721	49	185,230	41	72	115
Louisiana	4,028.1	1.8179	3.08	1,145,001	1,004,333	416,920	42	414,703	41	76	106
Oklahoma	2,970.7	1.3406	2.66	844,441	798,625	373,331	47	317,364	40	88	99
Texas	13,462.3	6.0755	2.91	4,960,932	4,562,213	2,020,799	44	1,901,321	42	99	87
MOUNTAIN	**10,772.8**	**4.8618**	**2.90**	**4,042,966**	**3,541,862**	**1,237,124**	**35**	**1,957,554**	**55**	**105**	**118**
Arizona	2,495.5	1.1262	2.90	956,480	865,586	292,279	34	454,756	53	102	88
Colorado	2,783.9	1.2564	2.80	1,171,732	1,056,786	330,450	31	600,003	57	118	87
Idaho	914.7	0.4128	2.95	307,835	262,733	100,890	38	147,505	56	92	92
Montana	800.9	0.3615	2.77	319,814	231,006	77,451	34	144,010	62	93	100
Nevada	708.3	0.3197	2.70	351,363	296,099	101,971	34	176,093	59	118	386
New Mexico	1,247.9	0.5632	2.97	413,622	365,123	147,322	40	178,159	49	103	94
Utah	1,363.4	0.6153	3.30	344,201	324,086	135,552	42	172,668	53	95	114
Wyoming	458.2	0.2067	2.82	177,919	140,443	51,209	36	84,360	60	97	119
PACIFIC	**30,656.1**	**13.8350**	**2.67**	**13,297,532**	**12,066,804**	**4,069,841**	**34**	**7,058,900**	**58**	**120**	**86**
Alaska	421.9	0.1905	3.47	327,247	255,128	66,157	26	97,287	38	142	56
California	22,870.7	10.3215	2.63	9,660,347	8,867,036	3,053,279	34	5,201,732	59	116	87
Hawaii	917.9	0.4142	3.40	536,776	486,352	165,180	34	276,938	57	185	104
Oregon	2,534.5	1.1438	2.70	1,101,219	956,591	329,761	34	566,169	59	127	80
Washington	3,911.1	1.7650	2.72	1,671,943	1,481,697	455,464	31	916,774	62	122	82
United States Total	**221,582.4**	**100.0000**	**2.83**	**76,750,667**	**68,353,103**	**25,646,772**	**38**	**34,908,256**	**51**	**100**	**100**

Sales by Metropolitan Area

This segment of the RGI report shows 300 metropolitan areas which include 33 *Sales & Marketing Management* potential metropolitan areas. The remainder are Standard Metropolitan Statistical Areas.

STATE Metro Name	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	1979 RAI	1979 RGI
ALABAMA											
Anniston	119.8	0.0541	2.97	32,760	31,856	15,645	49	11,827	37	88	72
Birmingham	829.1	0.3743	2.81	246,671	234,972	107,290	46	94,221	40	96	105
Florence	129.4	0.0584	2.79	27,761	27,761	13,634	49	10,308	37	70	100
Gadsden	100.4	0.0453	2.80	25,601	24,481	12,025	49	9,088	37	93	88
Huntsville	297.0	0.1340	3.03	85,569	81,283	39,910	49	31,281	38	100	92
Mobile	446.1	0.2013	3.07	118,422	110,288	53,034	48	40,836	37	92	102
Montgomery	262.3	0.1184	3.01	85,832	82,495	38,606	47	28,075	34	122	91
Tuscaloosa	131.8	0.0595	3.21	37,394	36,119	17,739	49	13,410	37	107	80
Non-Metro Portion of State	1,452.9	0.6556	2.88	198,554	194,056	104,212	54	71,150	37	52	138
State Total	**3,815.4**	**1.7219**	**2.91**	**866,534**	**830,917**	**405,830**	**49**	**313,021**	**38**	**80**	**107**
ALASKA											
Anchorage	187.7	0.0847	3.19	139,875	109,418	39,674	36	51,181	47	127	68
Non-Metro Portion of State	234.2	0.1058	3.73	187,372	145,710	26,483	18	46,106	32	156	47
State Total	**421.9**	**0.1905**	**3.47**	**327,247**	**255,128**	**66,157**	**26**	**97,287**	**38**	**142**	**56**
ARIZONA											
Phoenix	1,389.6	0.6271	2.83	600,706	550,490	184,656	34	278,639	51	113	85
Tucson	485.0	0.2189	2.82	172,568	155,261	58,669	38	78,344	50	91	95
Non-Metro Portion of State	620.9	0.2802	3.13	183,206	159,835	48,954	31	97,773	61	83	93
State Total	**2,495.5**	**1.1262**	**2.90**	**956,480**	**865,586**	**292,279**	**34**	**454,756**	**53**	**102**	**88**
ARKANSAS											
Fayetteville - Springdale	164.8	0.0744	2.80	48,115	46,578	23,758	51	18,554	40	95	83
Fort Smith	196.9	0.0888	2.76	53,157	50,920	25,568	50	20,284	40	85	88
Little Rock - North Little Rock	388.3	0.1752	2.83	122,129	117,522	58,431	50	47,352	40	102	108
Pine Bluff	84.5	0.0382	2.99	18,976	17,989	9,176	51	7,166	40	76	113
Texarkana	119.3	0.0538	2.70	34,077	32,396	15,042	46	13,218	41	72	96
Non-Metro Portion of State	1,362.2	0.6147	2.80	222,219	212,239	101,860	48	89,209	42	59	130
State Total	**2,221.8**	**1.0027**	**2.82**	**472,896**	**452,236**	**222,721**	**49**	**185,230**	**41**	**72**	**115**
CALIFORNIA											
Anaheim - Santa Ana - Garden Grove	1,913.2	0.8634	2.67	918,289	870,784	301,536	35	523,133	60	133	78
Bakersfield	376.0	0.1697	2.97	138,718	127,301	46,924	37	72,622	57	91	71
Fresno	491.7	0.2219	2.95	171,872	154,940	64,941	42	84,135	54	88	83
Los Angeles - Long Beach	7,161.3	3.2319	2.54	3,081,034	2,872,634	951,686	33	1,674,958	58	120	91
Modesto	251.1	0.1133	2.69	84,465	77,107	34,089	44	37,794	49	87	85
Oxnard - Simi Valley - Ventura	505.3	0.2281	2.94	159,704	148,655	59,949	40	84,215	57	88	85

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STATE Metro Name	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	1979 RAI	1979 RGI
CALIFORNIA *continued*											
Riverside - San Bernardino - Ontario	1,454.8	0.6566	2.66	524,040	481,220	200,600	42	251,838	52	109	83
Sacramento	980.5	0.4425	2.71	430,153	391,820	142,113	36	221,116	56	109	74
Salinas - Seaside - Monterey	285.5	0.1289	3.38	122,983	114,131	29,896	26	77,552	68	137	81
San Diego	1,841.2	0.8309	2.61	718,601	653,941	250,526	38	373,503	57	126	91
San Francisco - Oakland	3,222.7	1.4544	2.46	1,599,932	1,442,147	432,242	30	875,498	61	128	95
San Jose	1,262.7	0.5698	2.78	528,448	488,342	180,828	37	266,798	55	115	91
Santa Barbara - Santa Maria - Lompoc	297.2	0.1342	2.76	157,682	148,435	40,471	27	101,268	68	163	73
Santa Cruz	180.0	0.0813	2.54	80,041	73,652	25,799	35	44,026	60	108	66
Santa Rosa	282.5	0.1275	2.60	113,576	100,862	32,375	32	60,782	60	90	78
Stockton	322.1	0.1454	2.95	118,791	105,442	39,923	38	58,693	56	95	76
Vallejo - Fairfield - Napa	312.5	0.1410	2.77	115,945	104,647	36,235	35	64,094	61	106	74
Non-Metro Portion of State	1,730.4	0.7807	2.69	596,073	530,976	183,126	34	329,707	62	85	84
State Total	**22,870.7**	**10.3215**	**2.63**	**9,660,347**	**8,887,036**	**3,053,279**	**34**	**5,201,732**	**59**	**116**	**87**
COLORADO											
Colorado Springs	298.8	0.1348	3.01	99,878	92,021	42,096	46	43,720	48	114	102
Denver - Boulder	1,584.0	0.7150	2.77	714,815	644,459	197,736	31	355,648	55	123	87
Fort Collins	136.7	0.0617	2.81	58,634	55,496	17,611	32	31,367	57	129	67
Greeley	115.2	0.0520	2.95	31,762	27,639	8,772	32	15,620	57	101	96
Pueblo	123.4	0.0557	2.82	39,963	33,569	10,653	32	18,973	57	87	103
Non-Metro Portion of State	525.8	0.2372	2.73	226,680	203,602	53,582	26	134,675	66	114	82
State Total	**2,783.9**	**1.2564**	**2.80**	**1,171,732**	**1,056,786**	**330,450**	**31**	**600,003**	**57**	**118**	**87**
CONNECTICUT											
Bridgeport - Stamford - Norwalk - Danbury	816.6	0.3685	2.86	246,468	224,960	58,364	26	130,171	58	93	120
Hartford - New Britain - Bristol	1,053.1	0.4753	2.87	361,188	331,346	110,785	33	148,348	45	107	117
New Haven - West Haven - Waterbury - Meriden	759.5	0.3427	2.82	241,891	221,872	77,768	35	113,244	51	101	108
New London - Norwich	245.7	0.1109	2.99	64,914	55,593	18,284	33	30,935	56	91	113
Non-Metro Portion of State	253.3	0.1144	2.86	56,344	49,626	15,695	32	26,712	54	76	128
State Total	**3,128.2**	**1.4118**	**2.86**	**970,805**	**883,397**	**280,896**	**32**	**449,410**	**51**	**98**	**116**
DELAWARE											
Wilmington	519.9	0.2346	2.92	154,742	140,089	55,773	40	70,452	50	95	113
Non-Metro Portion of State	188.3	0.0849	2.85	63,005	58,296	20,574	35	31,394	54	82	77
State Total	**587.3**	**0.2650**	**2.88**	**180,651**	**166,598**	**66,086**	**40**	**81,921**	**49**	**89**	**106**
DISTRICT OF COLUMBIA											
Washington	3,054.6	1.3787	2.81	1,284,516	1,231,713	441,180	36	575,040	47	130	105
Non-Metro Portion of State	0.0	0.0000	2.88	0	0	0	0	0	0	0	0
State Total	**661.5**	**0.2985**	**2.38**	**409,101**	**384,733**	**111,618**	**29**	**189,673**	**49**	**292**	**118**
FLORIDA											
Bradenton	136.3	0.0615	2.28	64,545	59,301	20,593	35	32,440	55	105	67
Daytona Beach	224.9	0.1015	2.41	131,266	119,356	39,761	33	66,050	55	142	80
Fort Lauderdale - Hollywood	927.6	0.4186	2.46	556,659	516,018	142,764	28	330,326	64	135	68
Fort Myers - Cape Coral	199.7	0.0901	2.47	79,642	74,674	25,932	35	40,850	55	90	88
Gainesville	137.6	0.0621	2.95	64,607	60,934	21,160	35	33,333	55	125	56

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STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average House-hold Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
FLORIDA *continued*											
Jacksonville	720.2	0.3251	2.88	241,929	227,026	110,539	49	94,387	42	100	102
Lakeland - Winter Haven	284.4	0.1283	2.75	101,048	95,218	41,404	43	42,571	45	89	82
Melbourne - Titusville - Cocoa	257.3	0.1161	2.98	105,246	95,715	36,910	39	49,967	52	115	75
Miami	1,494.9	0.6746	2.63	674,428	627,835	180,861	29	356,101	57	122	107
Orlando	627.0	0.2829	2.71	295,956	280,287	114,804	41	136,487	49	114	108
Panama City	96.8	0.0437	2.87	48,555	44,383	15,413	35	24,279	55	165	71
Pensacola	281.8	0.1271	3.00	87,596	75,888	36,738	48	29,515	39	89	90
Sarasota	179.9	0.0812	2.23	113,050	106,469	27,729	26	66,143	62	136	63
Tallahassee	146.7	0.0663	2.90	61,381	57,881	20,101	35	31,664	55	113	76
Tampa - St. Petersburg	1,474.6	0.6656	2.37	615,516	563,981	204,051	36	289,221	51	98	88
West Palm Beach - Boca Raton	517.5	0.2335	2.58	241,314	216,863	56,445	26	142,754	66	101	89
Non-Metro Portion of State	1,249.6	0.5640	2.75	385,673	351,153	137,294	39	196,917	56	75	89
State Total	**8,956.8**	**4.0422**	**2.61**	**3,868,411**	**3,572,982**	**1,232,499**	**34**	**1,963,005**	**55**	**107**	**88**
GEORGIA											
Albany	107.6	0.0485	3.22	27,654	26,707	13,250	50	10,386	39	100	103
Athens	108.5	0.0490	2.92	33,824	32,096	17,944	56	11,581	36	114	76
Atlanta	1,906.7	0.8605	2.89	792,364	752,964	353,655	47	291,551	39	132	93
Augusta	292.9	0.1322	3.16	87,977	81,494	37,572	46	36,974	45	95	84
Columbus	227.1	0.1025	3.11	65,790	61,198	30,436	50	23,529	38	110	86
Macon	248.4	0.1121	3.09	73,247	69,432	34,606	50	26,838	39	96	94
Savannah	219.9	0.0992	3.05	77,199	70,428	35,083	50	27,213	39	113	89
Non-Metro Portion of State	2,099.1	0.9473	2.99	404,121	389,043	217,771	56	139,970	36	63	107
State Total	**5,166.2**	**2.3315**	**2.98**	**1,550,136**	**1,472,029**	**735,748**	**50**	**563,115**	**38**	**97**	**96**
HAWAII											
Honolulu	740.1	0.3340	3.45	441,457	395,184	140,821	36	215,540	55	212	93
Non-Metro Portion of State	177.8	0.0802	3.23	95,319	91,168	24,359	27	61,398	67	120	151
State Total	**917.9**	**0.4142**	**3.40**	**536,776**	**486,352**	**165,180**	**34**	**276,938**	**57**	**185**	**104**
IDAHO											
Boise	160.1	0.0723	2.87	91,896	84,171	32,148	38	46,735	56	137	61
Pocatello	70.9	0.0320	3.10	26,149	22,715	8,738	38	12,803	56	97	82
Non-Metro Portion of State	683.7	0.3085	2.96	189,790	155,847	60,004	39	87,967	56	78	110
State Total	**914.7**	**0.4128**	**2.95**	**307,835**	**262,733**	**100,890**	**38**	**147,505**	**56**	**92**	**92**
ILLINOIS											
Bloomington - Normal	121.2	0.0547	2.98	51,551	45,297	17,045	38	23,088	51	127	96
Champaign - Urbana - Rantoul	167.3	0.0755	2.98	84,645	74,984	28,218	38	38,219	51	152	64
Chicago	6,998.4	3.1585	2.87	2,963,628	2,650,145	918,128	35	1,398,773	53	131	98
Danville	98.3	0.0443	2.71	32,020	25,820	11,338	44	12,274	48	91	108
Davenport - Rock Island - Moline	378.1	0.1707	2.82	166,623	136,695	56,218	41	67,081	49	119	86
Decatur	129.8	0.0585	2.66	48,752	39,242	14,768	38	20,001	51	90	109
Kankakee	98.1	0.0442	3.11	39,498	34,564	13,007	38	17,617	51	125	79
Peoria	367.6	0.1660	2.81	143,261	121,072	53,705	44	56,811	47	104	101
Quincy	69.9	0.0316	2.74	24,580	18,605	8,171	44	8,844	48	88	117
Rockford	271.3	0.1224	2.77	103,619	90,955	30,458	33	52,384	58	110	92
Springfield	186.3	0.0842	2.58	77,888	66,188	24,918	38	33,750	51	101	112
Non-Metro Portion of State	1,946.0	0.8783	2.72	573,004	465,191	204,386	44	221,239	48	83	103
State Total	**11,259.3**	**5.0814**	**2.83**	**4,420,405**	**3,851,676**	**1,429,268**	**37**	**1,982,072**	**51**	**117**	**98**

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Circle No. 188 on Reader Service Card for CALIF MILK (Sectional) ➔

STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average House-hold Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
INDIANA											
Anderson	137.2	0.0619	2.83	47,781	41,277	18,763	45	18,000	44	102	89
Bloomington	94.5	0.0426	2.98	33,582	30,598	13,907	45	13,342	44	119	79
Elkhart	136.2	0.0614	2.93	53,467	46,544	19,910	43	21,614	46	107	84
Evansville	294.3	0.1327	2.84	112,069	95,421	44,386	47	39,569	41	116	95
Fort Wayne	374.6	0.1690	2.96	161,302	143,862	52,672	37	80,897	56	137	81
Gary - Hammond - East Chicago	648.3	0.2926	3.09	232,990	204,882	90,248	44	97,580	48	98	84
Indianapolis	1,168.1	0.5272	2.89	414,316	382,187	183,610	48	144,553	38	111	99
Kokomo	104.8	0.0474	2.86	39,120	34,516	15,689	45	15,054	44	112	81
Lafayette - West Lafayette	115.8	0.0522	3.09	48,291	44,053	20,024	45	19,213	44	138	77
Marion	83.9	0.0379	2.98	22,397	18,722	8,008	43	8,679	46	82	112
Michigan City - La Porte	106.0	0.0479	3.03	32,871	27,126	11,604	43	12,576	46	85	101
Muncie	126.0	0.0569	2.99	43,717	38,720	17,598	45	16,885	44	109	84
South Bend	278.9	0.1258	2.97	106,514	93,081	35,982	39	46,534	50	123	92
Terre Haute	172.0	0.0777	2.74	55,712	46,522	21,146	45	20,289	44	104	95
Non-Metro Portion of State	1,404.5	0.6337	2.89	339,395	291,859	124,865	43	135,292	46	79	108
State Total	**5,386.4**	**2.4308**	**2.92**	**1,787,514**	**1,576,350**	**697,447**	**44**	**704,645**	**45**	**103**	**94**
IOWA											
Cedar Rapids	170.2	0.0768	2.89	68,938	56,803	22,158	39	29,511	52	109	99
Davenport - Rock Island - Moline	378.1	0.1707	2.82	166,623	136,695	56,218	41	67,081	49	119	86
Des Moines	337.6	0.1524	2.80	146,044	125,972	50,494	40	58,064	46	101	113
Dubuque	96.1	0.0434	3.37	37,642	30,318	11,825	39	15,752	52	109	96
Iowa City	81.1	0.0366	2.90	35,498	29,471	11,616	39	16,284	55	124	77
Sioux City	120.7	0.0544	2.87	45,187	35,991	13,990	39	18,809	52	90	111
Waterloo - Cedar Falls	139.1	0.0628	3.03	51,836	41,557	16,211	39	21,590	52	99	98
Non-Metro Portion of State	1,753.1	0.7912	2.78	497,322	393,597	155,245	39	217,665	55	83	112
State Total	**2,923.8**	**1.3196**	**2.83**	**981,248**	**795,202**	**314,806**	**40**	**419,233**	**53**	**93**	**106**
KANSAS											
Lawrence	67.9	0.0306	2.97	21,990	19,357	9,409	49	8,154	42	113	80
Topeka	190.5	0.0859	2.77	65,058	59,887	29,110	49	25,226	42	104	106
Wichita	402.0	0.1815	2.80	186,458	175,146	86,676	49	68,335	39	148	79
Non-Metro Portion of State	1,286.0	0.5804	2.66	334,612	303,811	137,934	45	145,514	48	87	108
State Total	**2,390.9**	**1.0790**	**2.74**	**779,829**	**722,936**	**346,104**	**48**	**310,140**	**43**	**108**	**94**
KENTUCKY											
Clarksville - Hopkinsville	159.6	0.0720	3.42	36,268	33,554	15,659	47	14,499	43	101	86
Huntington - Ashland	302.0	0.1362	2.83	70,345	64,747	36,430	56	22,020	34	69	116
Lexington-Fayette	309.0	0.1395	2.92	120,421	114,042	57,745	51	42,704	37	108	85
Louisville	893.4	0.4032	2.88	358,805	322,679	159,492	49	124,433	39	114	90
Owensboro	84.0	0.0379	3.04	28,065	24,945	12,490	50	10,050	40	94	87
Non-Metro Portion of State	1,950.4	0.8804	2.96	341,879	327,941	169,121	52	137,675	42	56	117
State Total	**3,554.3**	**1.6040**	**2.96**	**939,456**	**872,401**	**432,283**	**50**	**356,076**	**41**	**79**	**100**
LOUISIANA											
Alexandria	140.7	0.0635	3.21	27,502	25,470	10,869	43	10,363	41	64	126
Baton Rouge	457.2	0.2063	3.03	131,798	116,591	58,106	50	48,482	42	72	113
Lafayette	139.0	0.0627	3.18	54,366	48,131	20,526	43	19,562	41	98	82
Lake Charles	158.9	0.0717	2.98	48,468	43,953	18,744	43	17,864	41	69	94
Monroe	134.3	0.0606	2.93	36,695	33,439	14,257	43	13,591	41	80	112

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STATE Metro Name	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	1979 RAI	1979 RGI
LOUISIANA *continued*											
New Orleans	1,163.8	0.5252	2.89	463,449	402,180	154,361	38	189,068	47	95	106
Shreveport	363.6	0.1641	2.96	107,645	99,042	45,164	46	37,762	38	94	98
Non-Metro Portion of State	1,470.6	0.6638	3.30	275,078	235,527	94,893	40	78,011	33	55	109
State Total	**4,028.1**	**1.8179**	**3.08**	**1,145,001**	**1,004,333**	**416,920**	**42**	**414,703**	**41**	**76**	**106**
MAINE											
Bangor	141.1	0.0637	3.08	34,481	32,437	11,948	37	17,947	55	74	114
Lewiston - Auburn	94.8	0.0428	2.80	27,630	26,000	9,576	37	14,384	55	89	94
Portland	234.1	0.1056	2.83	76,581	73,813	27,200	37	40,853	55	85	105
Non-Metro Portion of State	636.0	0.2870	2.92	159,523	152,019	56,000	37	84,116	55	82	102
State Total	**1,106.0**	**0.4991**	**2.91**	**298,215**	**284,269**	**104,724**	**37**	**157,300**	**55**	**82**	**104**
MARYLAND											
Baltimore	2,158.2	0.9740	2.89	782,253	664,284	290,604	44	262,154	39	96	97
Hagerstown	109.8	0.0495	2.77	32,485	27,188	11,299	42	13,334	49	75	106
Non-Metro Portion of State	531.6	0.2400	2.85	182,174	165,728	68,866	42	81,299	49	93	78
State Total	**4,183.2**	**1.8879**	**2.91**	**1,474,699**	**1,311,277**	**569,689**	**43**	**552,986**	**42**	**95**	**95**
MASSACHUSETTS											
Boston - Lowell - Brockton - Lawrence - Haverhill	3,901.6	1.7608	2.86	1,449,135	1,320,107	373,933	28	730,161	55	117	105
New Bedford - Fall River	470.7	0.2125	2.77	141,393	125,911	48,388	38	61,950	49	92	91
Pittsfield	141.6	0.0639	2.79	43,394	36,092	12,718	35	19,365	54	69	135
Springfield - Chicopee - Holyoke	588.3	0.2655	2.88	176,689	152,145	45,078	30	76,560	50	74	114
Worcester - Fitchburg - Leominster	646.7	0.2919	2.91	178,202	159,664	48,075	30	80,473	50	81	112
Non-Metro Portion of State	225.6	0.1017	2.57	150,861	140,969	31,136	22	95,042	67	157	58
State Total	**5,787.5**	**2.6119**	**2.84**	**2,066,152**	**1,863,644**	**536,078**	**29**	**1,021,371**	**55**	**108**	**104**
MICHIGAN											
Ann Arbor	258.6	0.1167	2.98	119,827	109,599	40,142	37	57,544	53	185	75
Battle Creek	183.6	0.0829	2.81	64,569	56,193	20,584	37	29,505	53	126	90
Bay City	120.7	0.0545	3.05	42,225	32,090	11,755	37	16,847	52	85	91
Benton Harbor - St. Joseph	213.7	0.0964	2.80	72,739	58,704	20,405	35	34,877	59	83	90
Detroit	4,371.9	1.9730	2.94	1,742,771	1,513,430	548,344	36	766,669	51	100	90
Flint	522.5	0.2358	2.91	187,686	156,477	60,612	39	75,951	49	93	91
Grand Rapids	587.7	0.2652	2.99	231,554	202,908	60,175	30	124,896	62	155	80
Jackson	152.5	0.0688	2.94	43,658	37,296	13,660	37	19,582	53	121	105
Kalamazoo - Portage	275.1	0.1242	2.93	100,202	87,579	33,658	38	47,072	54	124	85
Lansing - East Lansing	464.2	0.2095	2.94	173,556	146,195	62,670	43	69,149	47	118	87
Muskegon - Norton Shores - Muskegon Heights	179.4	0.0809	2.93	53,537	45,329	16,606	37	23,798	53	103	87
Saginaw	227.7	0.1028	3.06	111,002	93,511	34,253	37	49,103	53	120	70
Non-Metro Portion of State	1,532.8	0.6918	2.90	484,522	368,981	128,353	35	219,414	59	79	93
State Total	**9,223.1**	**4.1624**	**2.94**	**3,455,404**	**2,931,225**	**1,059,187**	**36**	**1,547,121**	**53**	**102**	**89**
MINNESOTA											
Duluth - Superior	266.1	0.1202	2.72	97,138	73,813	24,987	34	44,714	61	91	107
Fargo - Moorhead	138.5	0.0625	3.03	73,724	58,173	18,965	33	35,451	61	145	82
Minneapolis - St. Paul	2,074.6	0.9362	2.88	854,716	734,543	252,251	34	426,288	58	123	104

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STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
MINNESOTA *continued*											
Rochester	94.0	0.0424	2.97	38,942	34,738	11,383	33	20,941	60	126	140
St. Cloud	165.3	0.0745	3.47	49,405	38,410	12,587	33	23,155	60	127	93
Non-Metro Portion of State	1,474.1	0.6654	2.89	407,877	327,057	93,696	29	213,719	65	90	105
State Total	**4,071.8**	**1.8376**	**2.90**	**1,450,409**	**1,213,958**	**396,336**	**33**	**732,142**	**60**	**110**	**104**
MISSISSIPPI											
Biloxi - Gulfport	180.5	0.0815	3.19	60,035	54,673	28,712	53	19,389	35	99	91
Hattiesburg	83.8	0.0379	2.95	33,245	31,748	16,944	53	12,104	38	138	62
Jackson	308.3	0.1392	3.15	115,934	112,237	52,199	47	32,998	29	114	89
Meridian	72.3	0.0327	2.87	23,683	22,809	12,178	53	8,610	38	78	93
Pascagoula - Moss Point	117.7	0.0532	3.22	25,546	23,488	12,336	53	8,330	35	63	116
Non-Metro Portion of State	1,617.0	0.7295	3.11	224,514	214,902	115,084	54	81,839	38	46	133
State Total	**2,433.6**	**1.0983**	**3.12**	**488,723**	**465,623**	**240,358**	**52**	**165,476**	**36**	**64**	**110**
MISSOURI											
Columbia	93.8	0.0423	3.01	45,975	43,933	18,344	42	20,265	46	154	69
Joplin	121.6	0.0548	2.57	41,707	38,769	16,517	43	19,647	51	103	77
Kansas City	1,333.5	0.6018	2.68	565,287	529,846	232,956	44	227,967	43	129	92
St. Joseph	101.7	0.0459	2.64	33,617	29,582	12,352	42	13,645	46	97	97
St. Louis	2,390.3	1.0789	2.95	890,805	788,274	341,714	43	343,227	44	100	98
Springfield	210.1	0.0949	2.75	84,735	79,678	36,530	46	32,521	41	128	78
Non-Metro Portion of State	1,675.8	0.7561	2.71	357,537	318,941	136,281	43	162,450	51	71	113
State Total	**4,899.3**	**2.2110**	**2.77**	**1,665,207**	**1,521,757**	**638,295**	**42**	**695,566**	**46**	**101**	**98**
MONTANA											
Billings	107.8	0.0487	2.74	52,220	42,520	14,342	34	26,244	62	102	89
Great Falls	86.6	0.0391	2.80	38,269	27,653	9,328	34	17,069	62	104	97
Missoula	71.1	0.0321	2.82	35,778	26,796	8,960	33	16,592	62	113	82
Non-Metro Portion of State	535.4	0.2416	2.76	193,547	134,037	44,821	33	84,105	63	86	108
State Total	**800.9**	**0.3615**	**2.77**	**319,814**	**231,006**	**77,451**	**34**	**144,010**	**62**	**93**	**100**
NEBRASKA											
Lincoln	189.4	0.0854	2.76	84,823	73,529	27,919	38	39,909	54	138	91
Omaha	593.3	0.2679	2.96	251,339	203,805	76,495	38	108,724	53	122	100
Non-Metro Portion of State	877.1	0.3958	2.70	261,093	195,707	71,482	37	113,114	58	91	114
State Total	**1,590.4**	**0.7177**	**2.79**	**569,883**	**451,161**	**167,145**	**37**	**249,443**	**55**	**108**	**106**
NEVADA											
Las Vegas	400.3	0.1807	2.74	208,422	172,073	59,092	34	102,175	59	112	449
Reno	175.9	0.0794	2.55	95,642	85,781	29,598	35	51,072	60	136	232
Non-Metro Portion of State	132.1	0.0596	2.78	47,299	38,245	13,281	35	22,846	60	114	450
State Total	**708.3**	**0.3197**	**2.70**	**351,363**	**296,099**	**101,971**	**34**	**176,093**	**59**	**118**	**386**
NEW HAMPSHIRE											
Manchester - Nashua	268.8	0.1213	2.92	83,348	78,941	26,153	33	45,429	58	93	104
Non-Metro Portion of State	442.0	0.1994	2.87	131,172	127,113	41,484	33	75,254	59	84	109
State Total	**897.8**	**0.4051**	**2.93**	**288,042**	**277,298**	**90,887**	**33**	**162,863**	**59**	**88**	**97**

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STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
NEW JERSEY											
Atlantic City	191.5	0.0865	2.56	102,895	82,641	26,898	33	50,862	62	118	204
Jersey City	550.4	0.2484	2.61	136,518	95,480	31,974	33	48,936	51	62	159
Long Branch - Asbury Park	502.3	0.2267	3.18	195,105	161,487	50,236	31	96,402	60	92	84
Newark	1,938.7	0.8748	2.94	653,941	531,907	155,515	29	282,919	53	80	122
New Brunswick - Perth Amboy - Sayreville	589.8	0.2662	3.25	195,070	150,126	62,249	41	66,914	45	77	106
Paterson - Clifton - Passaic	449.4	0.2028	2.77	146,112	119,883	34,872	29	65,756	55	102	111
Trenton	320.5	0.1446	2.90	106,357	81,541	25,920	32	43,380	53	76	144
Vineland - Millville - Bridgeton	132.1	0.0596	2.94	37,973	29,442	9,438	32	16,141	55	52	113
Non-Metro Portion of State	613.2	0.2769	2.92	258,282	207,260	57,652	28	135,229	65	80	83
State Total	**7,341.8**	**3.3134**	**2.93**	**2,567,321**	**2,084,608**	**663,700**	**32**	**1,147,476**	**55**	**84**	**112**
NEW MEXICO											
Albuquerque	421.0	0.1900	2.80	173,986	156,826	62,092	40	72,461	46	33	88
Las Cruces	91.0	0.0411	3.29	26,240	21,903	8,859	40	11,117	51	101	90
Santa Fe	66.3	0.0300	2.99	37,092	35,348	14,401	41	17,878	51	168	67
Non-Metro Portion of State	669.6	0.3021	3.04	176,304	151,046	61,970	41	76,703	51	78	107
State Total	**1,247.9**	**0.5632**	**2.97**	**413,622**	**365,123**	**147,322**	**40**	**178,159**	**49**	**103**	**94**
NEW YORK											
Albany - Schenectady - Troy	787.1	0.3551	2.81	282,187	243,727	72,183	30	134,815	55	95	99
Binghamton	302.7	0.1365	2.75	88,053	73,928	24,242	33	41,333	56	81	100
Buffalo	1,278.8	0.5770	2.75	461,418	383,235	125,907	33	204,413	53	89	97
Elmira	96.2	0.0434	2.76	25,950	21,596	6,194	29	11,932	55	70	119
Jamestown	141.2	0.0638	2.61	53,491	44,807	13,736	31	25,875	58	121	80
Nassau - Suffolk	2,699.9	1.2185	3.24	822,104	759,843	226,438	30	395,731	52	88	102
Newburgh - Middletown	255.3	0.1153	2.93	69,842	61,447	17,760	29	36,428	59	59	103
New York	9,266.3	4.1819	2.55	3,066,608	2,782,680	761,966	27	1,560,576	56	111	135
Poughkeepsie	236.3	0.1067	3.02	63,432	56,116	16,097	29	31,003	55	62	112
Rochester	967.1	0.4366	2.78	309,915	271,676	82,737	30	149,780	55	87	108
Syracuse	645.4	0.2912	2.93	222,951	192,509	56,063	29	101,787	53	83	102
Utica - Rome	322.5	0.1456	2.77	102,443	85,387	31,524	37	40,410	47	84	95
Non-Metro Portion of State	1,680.4	0.7585	2.85	470,802	390,047	119,576	31	225,205	58	74	117
State Total	**17,776.0**	**8.0223**	**2.72**	**5,679,444**	**5,051,376**	**1,452,474**	**29**	**2,787,858**	**55**	**96**	**121**
NORTH CAROLINA											
Asheville	172.0	0.0777	2.66	53,182	50,242	23,982	48	20,690	41	98	104
Burlington	101.4	0.0457	2.85	26,110	25,502	12,171	48	10,501	41	87	100
Charlotte - Gastonia	619.9	0.2797	2.93	197,830	191,448	90,765	47	77,093	40	97	108
Fayetteville	236.8	0.1068	3.33	60,858	55,408	26,448	48	22,819	41	108	88
Greensboro - Winston-Salem - High Point	791.1	0.3571	2.81	256,375	249,096	107,182	43	94,152	38	111	94
Kannapolis - Concord - Salisbury	176.0	0.0795	2.77	37,846	36,069	18,448	51	15,225	42	78	108
Raleigh - Durham	508.8	0.2296	2.82	183,237	178,170	76,213	43	76,139	43	115	99
Wilmington	133.8	0.0604	2.65	44,558	42,872	20,463	48	17,654	41	96	89
Non-Metro Portion of State	2,920.2	1.3178	3.01	560,699	543,244	278,053	51	229,474	42	70	110
State Total	**5,670.3**	**2.5590**	**2.93**	**1,421,615**	**1,372,914**	**654,179**	**48**	**564,097**	**41**	**87**	**103**
NORTH DAKOTA											
Bismarck	79.1	0.0357	2.98	33,161	27,179	8,242	30	16,798	62	109	100
Fargo - Moorhead	138.5	0.0625	3.03	73,724	58,173	18,965	33	35,451	61	145	82

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STATE Metro Name	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	RAI	RGI
NORTH DAKOTA *continued*											
Grand Forks	103.3	0.0467	3.06	40,696	30,169	9,831	33	18,389	61	128	97
Non-Metro Portion of State	433.7	0.1957	3.01	125,220	82,873	25,374	31	51,711	62	84	126
State Total	**668.1**	**0.3015**	**3.02**	**240,692**	**175,866**	**55,030**	**31**	**108,675**	**62**	**107**	**105**
OHIO											
Akron	659.5	0.2976	2.89	250,727	222,084	90,560	41	117,116	53	95	86
Canton	407.8	0.1840	2.87	145,650	127,355	50,784	40	65,481	51	88	85
Cincinnati	1,385.8	0.6254	2.86	571,284	510,357	211,481	41	236,860	46	110	88
Cleveland	1,934.4	0.8731	2.82	719,188	628,087	223,886	36	331,537	53	97	104
Columbus	1,110.2	0.5009	2.83	450,011	404,345	180,004	45	186,415	46	122	90
Dayton	838.1	0.3782	2.87	297,792	268,358	121,609	45	120,137	45	108	93
Hamilton - Middletown	261.9	0.1182	3.03	75,345	63,445	38,051	60	21,019	33	75	100
Lima	210.4	0.0950	2.96	69,549	63,092	26,201	42	30,360	48	102	87
Lorain - Elyria	274.9	0.1241	3.09	68,993	54,883	24,216	44	25,209	46	66	130
Mansfield	130.0	0.0587	2.93	42,987	37,343	15,507	42	17,970	48	91	94
Newark	119.7	0.0540	2.95	32,767	28,533	11,892	42	13,759	48	85	103
Parkersburg - Marietta	159.0	0.0717	2.89	45,323	41,086	18,259	44	18,243	44	74	103
Springfield	182.5	0.0824	2.91	46,678	42,022	17,450	42	20,218	48	73	121
Steubenville - Weirton	161.4	0.0728	2.88	39,774	31,608	13,796	44	14,339	45	63	132
Toledo	784.9	0.3542	2.80	300,852	263,336	99,152	38	133,558	51	104	91
Youngstown - Warren	547.1	0.2469	3.07	166,619	141,552	61,184	43	67,260	48	83	101
Non-Metro Portion of State	2,089.3	0.9432	2.94	538,216	458,790	191,205	42	221,259	48	75	101
State Total	**10,811.6**	**4.8793**	**2.88**	**3,720,823**	**3,261,706**	**1,345,225**	**41**	**1,579,047**	**48**	**95**	**96**
OKLAHOMA											
Enid	66.2	0.0299	2.59	23,888	22,931	10,622	46	9,594	42	118	80
Lawton	123.9	0.0559	3.26	25,874	23,790	11,105	47	9,481	40	93	102
Oklahoma City	809.1	0.3652	2.68	327,644	308,405	148,105	48	115,265	37	116	85
Tulsa	642.1	0.2898	2.62	201,689	192,339	87,026	45	75,402	39	90	106
Non-Metro Portion of State	1,260.2	0.5686	2.62	255,464	241,762	112,085	46	103,878	43	67	111
State Total	**2,970.7**	**1.3406**	**2.66**	**844,441**	**798,625**	**373,331**	**47**	**317,364**	**40**	**88**	**99**
OREGON											
Eugene - Springfield	267.9	0.1209	2.75	102,843	90,725	37,314	41	46,099	51	110	87
Portland	1,188.4	0.5364	2.66	572,885	494,453	168,295	34	287,905	58	154	84
Salem	237.1	0.1069	2.77	89,666	79,046	27,310	35	46,517	59	139	76
Non-Metro Portion of State	1,020.4	0.4605	2.72	396,069	343,064	115,500	34	214,767	63	102	76
State Total	**2,534.5**	**1.1438**	**2.70**	**1,101,219**	**956,591**	**329,761**	**34**	**566,169**	**59**	**127**	**80**
PENNSYLVANIA											
Allentown - Bethlehem - Easton	627.1	0.2829	2.77	194,826	170,030	64,524	38	78,481	46	80	104
Altoona	134.4	0.0607	2.75	38,600	33,272	11,943	36	16,976	51	75	106
Erie	268.3	0.1211	3.01	78,008	63,251	27,143	43	30,650	48	100	122
Harrisburg	435.6	0.1967	2.73	163,352	139,431	57,793	41	67,050	48	89	113
Johnstown	267.3	0.1206	2.83	59,418	46,116	22,594	49	18,988	41	63	158
Lancaster	354.1	0.1599	2.85	101,767	90,232	33,019	37	51,675	57	88	120
Northeast Pennsylvania	634.5	0.2863	2.75	185,333	156,544	54,217	35	78,228	50	81	123
Philadelphia	4,771.5	2.1533	2.90	1,513,495	1,264,189	431,838	34	651,295	52	96	124
Pittsburgh	2,249.7	1.0153	2.79	714,378	581,733	189,514	33	310,731	53	89	122
Reading	306.5	0.1383	2.62	97,984	85,466	31,050	36	47,980	56	100	111
Williamsport	113.6	0.0513	2.86	27,004	21,006	7,541	36	10,716	51	54	147
York	359.9	0.1624	2.83	101,444	87,621	37,005	42	41,140	47	79	109
Non-Metro Portion of State	2,333.4	1.0530	2.93	520,647	426,129	160,085	38	224,126	53	66	125
State Total	**11,769.5**	**5.3116**	**2.84**	**3,438,237**	**2,870,104**	**1,025,886**	**36**	**1,467,494**	**51**	**85**	**124**

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STATE Metro Name	12/31/79 Population (Thous.)	12/31/79 % Of U.S.	12/31/79 Average Household Size	1979 Eating & Drinking Place Sales ($000)	1979 Eating Place Sales ($000)	1979 Fast Food Sales ($000)	1979 Fast Food Market Share (%)	1979 Restaurant Sales ($000)	1979 Restaurant Market Share (%)	1979 RAI	1979 RGI
RHODE ISLAND											
Providence - Warwick - Pawtucket	849.2	0.3832	2.85	234,638	209,069	62,163	30	121,424	58	92	120
Non-Metro Portion of State	83.9	0.0379	3.15	32,331	26,816	7,276	27	16,733	62	151	84
State Total	**933.1**	**0.4211**	**2.88**	**266,969**	**235,885**	**69,439**	**29**	**138,157**	**59**	**96**	**116**
SOUTH CAROLINA											
Anderson	122.8	0.0554	2.76	28,152	26,935	12,600	47	11,956	44	64	106
Charleston - North Charleston	398.2	0.1797	3.21	111,609	105,672	51,616	49	37,680	36	97	90
Columbia	388.2	0.1752	3.29	119,008	113,084	54,878	49	43,005	38	101	97
Greenville - Spartanburg	546.8	0.2468	2.90	172,291	165,673	84,227	51	64,265	39	96	87
Non-Metro Portion of State	1,411.2	0.6369	3.14	293,937	281,728	131,851	47	125,048	44	73	120
State Total	**2,967.9**	**1.3394**	**3.10**	**741,331**	**708,620**	**342,329**	**48**	**288,998**	**41**	**83**	**104**
SOUTH DAKOTA											
Rapid City	96.0	0.0433	3.02	48,215	41,688	11,635	28	26,962	65	131	69
Sioux Falls	105.5	0.0476	2.95	55,821	47,877	15,236	32	29,742	62	148	81
Non-Metro Portion of State	500.9	0.2261	2.88	144,290	107,401	30,271	28	70,199	65	87	113
State Total	**702.4**	**0.3170**	**2.91**	**248,326**	**196,966**	**57,142**	**29**	**126,903**	**64**	**105**	**96**
TENNESSEE											
Chattanooga	409.0	0.1846	2.62	113,145	107,862	49,170	46	50,403	47	89	113
Clarksville - Hopkinsville	159.6	0.0720	3.42	36,268	33,554	15,659	47	14,499	43	101	86
Jackson	73.5	0.0332	2.88	22,284	20,606	9,382	46	9,747	47	87	98
Johnson City - Kingsport - Bristol	417.3	0.1883	2.86	99,196	95,916	52,576	55	29,747	31	80	95
Knoxville	460.4	0.2080	2.84	136,955	128,355	64,626	50	50,201	39	95	105
Memphis	904.7	0.4083	3.01	252,343	237,706	104,384	44	101,296	43	87	119
Nashville-Davidson	803.0	0.3624	2.83	301,864	288,767	110,549	38	145,210	50	113	95
Non-Metro Portion of State	1,568.1	0.7073	2.84	280,268	265,253	121,020	46	125,739	47	63	117
State Total	**4,425.3**	**1.9972**	**2.85**	**1,184,258**	**1,122,623**	**498,294**	**44**	**506,319**	**45**	**88**	**106**
TEXAS											
Abilene	134.7	0.0608	2.71	42,246	40,556	18,116	45	16,703	41	94	98
Amarillo	161.9	0.0731	2.67	91,883	82,858	37,015	45	34,119	41	119	69
Austin	506.1	0.2283	3.04	244,921	219,745	94,692	43	95,850	44	128	69
Beaumont - Port Arthur - Orange	366.8	0.1656	2.77	131,100	121,471	57,336	47	46,873	39	90	86
Brownsville - Harlingen - San Benito	190.2	0.0858	3.47	53,914	49,253	22,004	45	20,283	41	78	89
Bryan - College Station	82.1	0.0370	2.93	32,453	30,355	13,560	45	12,501	41	160	68
Corpus Christi	303.9	0.1372	3.13	108,673	95,071	39,428	41	43,403	46	77	86
Dallas - Fort Worth	2,798.0	1.2627	2.83	1,268,016	1,191,124	511,927	43	470,077	39	140	83
El Paso	453.0	0.2044	3.37	151,062	125,327	49,710	40	57,502	46	99	86
Galveston - Texas City	206.1	0.0930	2.87	70,460	64,018	28,601	45	26,364	41	78	91
Houston	2,779.4	1.2545	2.85	1,216,215	1,116,438	500,378	45	469,526	42	106	88
Killeen - Temple	210.2	0.0949	3.21	53,890	50,985	22,779	45	20,997	41	103	84
Laredo	89.4	0.0403	3.53	25,509	23,360	10,436	45	9,620	41	66	82
Longview - Marshall	136.8	0.0617	2.83	51,930	49,472	22,104	45	20,375	41	82	75
Lubbock	205.2	0.0926	2.86	92,589	85,712	38,292	45	35,298	41	115	74
McAllen - Pharr - Edinburg	244.7	0.1105	3.70	56,981	49,583	26,994	54	15,388	31	59	83
Midland	76.7	0.0346	2.86	27,720	25,701	11,482	45	10,584	41	81	104
Odessa	111.3	0.0503	2.88	61,268	55,808	24,933	45	22,983	41	111	59
San Angelo	78.9	0.0356	2.67	31,525	28,096	12,551	45	11,570	41	93	81

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STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
TEXAS *continued*											
San Antonio	1,048.0	0.4730	3.15	359,985	324,585	133,193	41	140,886	43	105	91
Sherman - Denison	85.3	0.0385	2.55	24,551	24,213	10,817	45	9,972	41	80	101
Texarkana	119.3	0.0538	2.70	34,077	32,396	15,042	46	13,218	41	72	96
Tyler	115.6	0.0521	2.73	41,507	40,446	18,069	45	16,657	41	85	90
Victoria	64.9	0.0293	3.14	27,097	23,224	11,117	48	10,333	44	92	71
Waco	161.4	0.0728	2.73	64,086	58,284	26,039	45	24,003	41	103	85
Wichita Falls	128.6	0.0581	2.74	44,738	40,956	18,297	45	16,866	41	96	86
Non-Metro Portion of State	2,648.8	1.1953	2.84	562,912	522,190	250,476	48	232,960	45	58	107
State Total	**13,462.3**	**6.0755**	**2.91**	**4,960,932**	**4,562,213**	**2,020,799**	**44**	**1,90[illegible],321**	**42**	**99**	**87**
UTAH											
Provo - Orem	194.9	0.0880	3.68	36,139	34,573	14,745	43	18,128	52	80	122
Salt Lake City - Ogden	876.3	0.3954	3.26	235,298	220,517	98,938	45	110,001	50	96	120
Non-Metro Portion of State	292.2	0.1319	3.22	72,764	68,996	21,869	32	44,539	65	102	92
State Total	**1,363.4**	**0.6153**	**3.30**	**344,201**	**324,086**	**135,552**	**42**	**172,668**	**53**	**95**	**114**
VERMONT											
Burlington	115.5	0.0521	3.08	40,179	36,873	9,392	25	22,272	60	119	108
Non-Metro Portion of State	381.8	0.1723	2.82	98,337	90,738	23,123	25	54,820	60	83	138
State Total	**497.3**	**0.2244**	**2.87**	**138,516**	**127,611**	**32,515**	**25**	**77,092**	**60**	**91**	**129**
VIRGINIA											
Danville	107.2	0.0483	2.87	22,616	22,130	10,328	47	9,051	41	63	113
Lynchburg	150.8	0.0680	2.90	36,315	35,791	15,589	44	15,369	43	71	109
Newport News - Hampton	368.4	0.1664	3.03	135,257	132,634	47,993	36	65,827	50	132	83
Norfolk - Virginia Beach - Portsmouth	821.7	0.3709	3.20	249,248	236,936	121,920	51	93,172	39	111	92
Petersburg - Colonial Heights - Hopewell	130.0	0.0588	3.08	27,435	26,119	11,397	44	11,218	43	72	106
Richmond	626.0	0.2826	2.82	229,665	224,004	97,669	44	92,541	41	113	97
Roanoke	217.3	0.0980	2.66	75,515	73,689	32,088	44	31,627	43	95	98
Non-Metro Portion of State	1,694.8	0.7647	2.91	327,143	321,701	150,378	47	131,737	41	63	115
State Total	**5,260.9**	**2.3743**	**2.95**	**1,538,520**	**1,500,992**	**633,315**	**42**	**656,045**	**44**	**93**	**100**
WASHINGTON											
Bremerton	134.7	0.0608	2.79	39,444	34,587	10,728	31	22,276	64	82	105
Olympia	118.7	0.0536	2.72	42,196	37,927	11,761	31	24,428	64	101	90
Richland - Kennewick - Pasco	133.6	0.0604	3.05	55,716	48,629	15,208	31	29,928	62	93	91
Seattle - Everett	1,526.8	0.6890	2.61	832,779	755,631	214,550	28	471,507	62	146	73
Spokane	332.5	0.1500	2.72	121,193	107,019	40,637	38	60,512	57	114	103
Tacoma	455.3	0.2055	2.93	148,040	127,077	44,760	35	74,222	58	112	92
Yakima	160.3	0.0723	2.72	55,768	48,319	15,114	31	29,737	62	101	91
Non-Metro Portion of State	869.9	0.3925	2.76	316,563	271,611	84,048	31	175,045	64	102	84
State Total	**3,911.1**	**1.7650**	**2.72**	**1,671,943**	**1,481,697**	**455,464**	**31**	**916,774**	**62**	**122**	**82**
WEST VIRGINIA											
Charleston	260.0	0.1173	2.76	82,715	78,345	36,153	46	33,024	42	92	102
Huntington - Ashland	302.0	0.1362	2.80	70,345	64,747	36,430	56	22,020	34	69	116
Parkersburg - Marietta	159.0	0.0717	2.89	45,323	41,086	18,259	44	18,243	44	74	103
Steubenville - Weirton	161.4	0.0728	2.88	39,774	31,608	13,796	44	14,339	45	63	132

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STATE Metro Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
WEST VIRGINIA *continued*											
Wheeling	183.1	0.0825	2.75	62,152	52,237	23,131	44	23,279	45	92	99
Non-Metro Portion of State	1,211.2	0.5467	2.93	192,473	176,039	83,452	47	72,660	41	51	147
State Total	**1,885.1**	**0.8508**	**2.87**	**400,197**	**365,224**	**174,744**	**48**	**149,011**	**41**	**65**	**125**
WISCONSIN											
Appleton - Oshkosh	295.9	0.1336	3.07	108,216	80,925	27,728	34	48,359	60	99	99
Duluth - Superior	266.1	0.1202	2.72	97,138	73,813	24,987	34	44,714	61	91	107
Eau Claire	126.4	0.0570	3.01	58,252	40,405	13,010	32	24,571	61	130	81
Green Bay	180.0	0.0812	3.15	73,486	56,224	18,102	32	34,191	61	106	88
Janesville - Beloit	136.4	0.0615	2.94	53,043	41,301	11,651	28	27,290	66	88	92
Kenosha	127.8	0.0577	2.90	44,954	31,664	10,194	32	19,256	61	96	109
La Crosse	90.6	0.0409	2.90	52,689	41,148	13,248	32	25,023	61	157	66
Madison	325.5	0.1469	2.75	171,003	138,813	52,499	38	78,186	56	155	84
Manitowoc - Two Rivers	84.9	0.0383	2.95	25,971	17,554	4,952	28	11,599	66	83	110
Milwaukee	1,413.4	0.6378	2.87	606,716	483,705	159,112	33	282,622	58	103	99
Racine	178.5	0.0806	2.86	58,122	45,168	14,543	32	27,468	61	83	110
Sheboygan	102.3	0.0462	2.81	31,180	21,759	6,140	28	14,378	66	70	123
Wausau	110.5	0.0499	3.02	34,193	23,768	6,706	28	15,708	66	76	127
Non-Metro Portion of State	1,477.5	0.6667	2.91	542,223	363,537	102,645	28	240,433	66	92	99
State Total	**4,738.5**	**2.1385**	**2.90**	**1,889,826**	**1,403,102**	**446,480**	**32**	**859,433**	**61**	**101**	**97**
WYOMING											
Cheyenne	69.6	0.0314	2.74	24,573	21,353	7,775	36	12,810	60	131	124
Non-Metro Portion of State	388.6	0.1753	2.84	153,346	119,090	43,434	36	71,550	60	92	118
State Total	**458.2**	**0.2067**	**2.82**	**177,919**	**140,443**	**51,209**	**36**	**84,360**	**60**	**97**	**119**
United States Total	**221,582.4**	**100.0000**	**2.83**	**76,750,667**	**68,353,103**	**25,646,772**	**38**	**34,908,256**	**51**	**100**	**100**

Sales by Area of Dominant Influence (ADI)

This eighth installment of the ADI Report shows 214 areas of dominant influence for a TV signal. Each area includes major cities and nearby counties.

ADI Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Abilene - Sweetwater	290.1	0.1309	2.64	78,706	75,570	34,745	46	32,341	43	78	103
Albany, Ga.	339.2	0.1528	3.03	64,914	62,896	33,609	53	23,361	37	65	119
Albany - Schenectady - Troy	1,252.6	0.5653	2.78	421,375	362,524	109,703	30	202,245	56	86	104
Albuquerque	909.6	0.4105	3.00	322,416	289,248	111,727	39	144,606	50	112	89
Alexandria, La.	224.0	0.1011	3.32	37,604	31,870	13,420	42	12,482	39	50	138

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ADI Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Alexandria, Minn.	236.9	0.1071	2.85	68,377	52,932	15,241	29	34,619	65	89	102
Alpena	43.7	0.0197	2.88	15,195	11,420	3,970	35	6,756	59	73	79
Amarillo	451.0	0.2035	2.77	163,894	150,960	68,319	45	65,468	43	93	84
Anchorage	233.6	0.1054	3.26	160,080	122,516	42,058	34	55,330	45	115	71
Anniston	119.8	0.0541	2.97	32,760	31,856	15,645	49	11,827	37	88	72
Ardmore - Ada	173.7	0.0784	2.58	32,929	31,146	14,448	46	13,163	42	59	118
Atlanta	2,806.8	1.2666	2.91	991,383	946,333	461,746	49	360,984	38	113	93
Augusta	519.5	0.2347	3.15	105,715	98,818	46,945	48	43,806	44	68	104
Austin, Tex.	617.4	0.2786	2.96	270,662	243,967	106,311	44	106,645	44	117	71
Bakersfield	376.0	0.1697	2.97	138,718	127,301	46,924	37	72,622	57	91	71
Baltimore	2,335.8	1.0541	2.88	838,568	715,997	310,405	43	289,866	40	95	95
Bangor	343.4	0.1549	2.91	77,515	74,329	27,382	37	41,135	55	69	115
Baton Rouge	651.7	0.2939	3.16	169,682	148,165	70,964	48	59,007	40	69	112
Beaumont - Port Arthur	431.0	0.1945	2.79	139,868	129,896	61,505	47	50,640	39	81	90
Bend	56.1	0.0253	2.67	24,970	22,487	7,569	34	14,074	63	93	75
Billings	179.8	0.0810	2.75	73,645	57,396	19,510	34	35,545	62	100	99
Biloxi - Gulfport - Pascagoula	160.6	0.0726	3.21	57,056	52,428	27,535	53	18,593	35	111	87
Binghamton	419.9	0.1893	2.78	106,713	87,985	28,882	33	49,208	56	69	115
Birmingham	1,292.8	0.5837	2.82	312,728	299,438	140,885	47	117,972	39	82	110
Bluefield - Beckley - Oak Hill	367.9	0.1659	2.92	64,645	60,958	28,830	47	24,983	41	48	145
Boise	362.3	0.1636	2.89	149,445	132,500	50,275	38	74,692	56	106	78
Boston	5,376.3	2.4262	2.86	1,948,646	1,784,511	505,049	28	1,001,545	56	111	102
Bowling Green	80.6	0.0363	2.95	28,815	25,962	13,437	52	10,802	42	86	81
Bristol - Kingsport - Johnson City	733.6	0.3308	2.93	137,077	132,913	69,879	53	45,637	34	65	113
Buffalo	1,763.2	0.7957	2.76	589,953	487,409	158,468	33	264,004	54	86	98
Burlington - Plattsburgh	587.1	0.2648	2.94	161,198	142,982	38,548	27	85,226	60	86	124
Casper - Riverton	140.7	0.0634	2.90	57,619	42,773	15,617	37	25,728	60	82	107
Cedar Rapids - Waterloo	769.5	0.3474	2.93	262,105	206,811	79,694	39	112,653	54	101	99
Charleston, S.C.	523.8	0.2364	3.23	132,605	125,386	60,849	49	46,440	37	89	94
Charleston - Huntington	1,427.4	0.6443	2.96	281,743	255,558	123,460	48	106,071	42	58	123
Charlotte	1,621.1	0.7315	2.93	419,532	404,632	197,956	49	168,019	42	86	105
Charlottesville	91.4	0.0412	2.84	32,591	32,441	15,151	47	13,274	41	98	89
Chattanooga	741.2	0.3345	2.72	177,602	169,499	80,171	47	76,225	45	75	111
Cheyenne	158.2	0.0712	2.74	49,967	44,081	15,289	35	26,594	60	97	113
Chicago	8,295.4	3.7440	2.89	3,433,726	3,047,217	1,086,370	36	1,592,606	52	126	97
Chico - Redding	325.7	0.1470	2.57	107,859	93,902	32,357	34	58,339	62	77	88
Cincinnati	1,924.8	0.8685	2.88	697,194	615,905	268,733	44	277,233	45	99	92
Clarksburg - Weston	222.9	0.1005	2.80	39,850	37,355	17,734	47	15,447	41	65	127
Cleveland	3,865.1	1.7445	2.88	1,362,067	1,187,350	454,271	38	613,719	52	92	99
Colorado Springs - Pueblo	534.8	0.2412	2.89	166,760	149,362	58,946	39	78,476	53	100	103
Columbia, S.C.	666.8	0.3010	3.29	164,942	157,308	75,582	48	62,539	40	87	105
Columbia - Jefferson City	409.1	0.1846	2.84	127,747	116,747	49,391	42	57,337	49	99	92
Columbus, Ga.	496.4	0.2240	3.04	110,424	104,514	54,137	52	39,330	38	86	99
Columbus - Tupelo, Miss.	372.3	0.1678	3.01	67,933	64,215	34,441	54	24,448	38	59	113
Columbus, Ohio	1,647.3	0.7433	2.86	590,113	527,584	231,366	44	245,729	47	110	91
Corpus Christi	442.1	0.1995	3.16	143,437	127,110	54,615	43	57,691	45	72	86
Dallas - Ft. Worth	3,356.8	1.5149	2.79	1,387,982	1,305,530	565,727	43	520,219	40	125	86
Davenport - Rock Island - Moline	861.8	0.3887	2.81	322,878	258,040	107,109	42	128,638	50	104	96
Dayton	1,265.9	0.5713	2.89	412,461	371,198	164,631	44	169,253	46	98	96
Denver	2,141.4	0.9665	2.78	972,826	871,977	266,020	31	495,464	57	123	86

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ADI Name	12/31/79 Population (Thous.)	% Of U.S.	Average Household Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Des Moines	949.4	0.4285	2.76	318,328	265,438	105,430	40	135,117	51	89	112
Detroit	4,763.2	2.1496	2.95	1,890,154	1,645,962	596,456	36	836,927	51	103	90
Dothan	212.6	0.0961	2.87	37,540	36,922	19,833	54	13,552	37	66	113
Dubuque	96.1	0.0434	3.37	37,642	30,318	11,825	39	15,752	52	109	96
Duluth - Superior	474.7	0.2144	2.74	164,675	123,139	39,326	32	76,800	62	88	108
El Centro - Yuma	168.2	0.0759	3.03	53,208	46,160	14,978	32	28,444	62	80	85
El Paso	607.8	0.2743	3.32	195,765	161,661	64,637	40	75,958	47	98	89
Elmira	238.8	0.1078	2.81	61,553	49,729	15,268	31	27,838	56	73	121
Erie	399.3	0.1802	2.99	110,042	88,151	36,499	41	43,750	50	94	124
Eugene	420.0	0.1895	2.77	162,926	141,133	54,278	38	77,642	55	106	83
Eureka	143.0	0.0644	2.64	56,632	49,126	16,890	34	30,535	62	89	86
Evansville	635.9	0.2867	2.83	186,216	159,570	74,921	47	67,348	42	88	109
Fargo	597.0	0.2695	2.93	208,274	159,015	49,839	31	98,723	62	112	100
Farmington	79.5	0.0359	3.18	19,976	16,187	6,568	41	8,215	51	61	109
Flagstaff	74.8	0.0337	3.37	39,635	37,212	11,397	31	22,762	61	162	64
Flint - Saginaw - Bay City	1,277.1	0.5765	2.99	446,038	361,246	134,150	37	189,043	52	90	88
Florence, S.C.	252.3	0.1139	3.15	42,529	41,663	19,491	47	18,546	45	57	138
Ft. Myers - Naples	350.7	0.1583	2.47	138,741	127,926	46,701	37	70,756	55	89	88
Ft. Smith	317.1	0.1431	2.78	86,282	82,574	41,595	50	32,972	40	89	86
Ft. Wayne	618.7	0.2791	2.95	222,836	195,068	74,364	38	105,010	54	115	88
Fresno	988.3	0.4460	2.92	300,928	271,157	105,015	39	156,307	58	81	87
Gainesville	166.6	0.0752	2.90	68,980	65,045	22,792	35	35,670	55	110	60
Grand Junction	121.2	0.0547	2.68	40,256	37,856	10,037	27	24,962	66	97	83
Grand Rapids - Kalamazoo - Battle Creek	1,556.9	0.7026	2.93	533,755	457,128	154,246	34	262,924	58	121	86
Great Falls	191.1	0.0865	2.80	68,477	48,276	16,285	34	30,095	62	92	111
Green Bay	995.2	0.4492	2.97	366,193	265,230	83,721	32	165,535	62	97	94
Greensboro - Winston-Salem - High Point	1,192.1	0.5380	2.82	330,825	322,290	143,724	45	124,898	39	97	99
Greenville - New Bern - Washington	612.8	0.2767	3.19	124,464	117,222	60,036	51	49,547	42	77	96
Greenville - Spartanburg - Asheville	1,510.2	0.6813	2.83	361,277	347,429	173,069	50	141,130	41	76	104
Greenwood - Greenville	149.1	0.0673	3.37	16,855	16,389	8,751	53	6,184	38	40	143
Harrisburg - York - Lancaster - Lebanon	1,320.9	0.5964	2.82	403,402	348,208	139,432	40	176,125	51	83	115
Harrisonburg	102.3	0.0461	2.97	22,521	21,124	9,885	47	8,655	41	70	105
Hartford - New Haven	1,971.8	0.8899	2.85	637,068	582,590	197,842	34	277,402	48	102	115
Helena	42.4	0.0191	2.74	22,193	16,397	5,431	33	10,221	62	96	92
Houston	3,236.7	1.4610	2.86	1,358,314	1,243,695	559,524	45	523,778	42	101	87
Huntsville - Decatur - Florence	648.7	0.2926	2.90	144,528	140,152	69,915	50	53,330	38	81	105
Idaho Falls - Pocatello	280.0	0.1264	3.22	74,313	63,901	24,510	38	36,207	57	77	115
Indianapolis	2,236.6	1.0095	2.90	729,522	658,120	305,528	46	268,451	41	104	97
Jackson, Miss.	815.7	0.3681	3.13	186,765	179,575	88,354	49	58,728	33	72	107
Jackson, Tenn.	115.3	0.0520	2.85	29,416	27,511	12,520	46	13,012	47	75	97
Jacksonville	974.8	0.4401	2.90	308,214	288,799	141,225	49	121,093	42	93	103
Johnstown - Altoona	778.0	0.3510	2.89	191,273	160,023	64,834	41	78,387	49	70	122
Jonesboro	182.0	0.0821	2.70	30,984	29,954	14,408	48	12,636	42	61	124
Joplin - Pittsburg	422.6	0.1907	2.56	116,989	110,685	49,880	45	52,531	47	93	93
Kansas City	1,887.9	0.8521	2.72	687,748	635,164	280,208	44	278,325	44	118	96
Knoxville	1,068.8	0.4827	2.91	261,336	249,914	122,026	49	105,888	42	79	104
La Crosse - Eau Claire	430.8	0.1944	2.95	171,237	118,933	36,880	31	74,230	62	110	90
Lafayette, Ind.	115.8	0.0522	3.09	48,291	44,053	20,024	45	19,213	44	138	77
Lafayette, La.	512.9	0.2315	3.20	114,356	97,974	40,641	41	35,927	37	64	106
Lake Charles	197.5	0.0892	3.01	53,545	47,617	20,199	42	19,085	40	64	102
Lansing	609.5	0.2751	2.92	213,605	182,339	75,295	41	88,998	49	124	90

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ADI Name	12/31/79 Population (Thous.)	% Of U.S.	Average House-hold Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Laredo	95.6	0.0431	3.49	26,519	24,370	10,932	45	10,081	41	66	82
Las Vegas	403.4	0.1821	2.74	209,701	173,006	59,419	34	102,739	59	112	447
Laurel - Hattiesburg	229.5	0.1037	3.02	54,180	51,872	27,712	53	19,675	38	80	86
Lexington	701.9	0.3169	2.98	197,169	189,784	96,797	51	74,538	39	83	88
Lima	106.8	0.0482	2.93	42,477	39,064	16,222	42	18,799	48	115	82
Lincoln - Hastings - Kearney	653.1	0.2947	2.68	218,994	173,939	65,374	38	97,112	56	108	108
Little Rock	1,168.2	0.5273	2.81	258,782	248,236	121,703	49	101,907	41	76	117
Los Angeles	10,413.2	4.6996	2.59	4,449,411	4,153,830	1,440,599	35	2,404,366	58	121	88
Louisville	1,422.4	0.6422	2.93	462,684	417,887	205,625	49	165,850	40	98	96
Lubbock	402.5	0.1816	2.88	130,887	122,059	55,495	45	51,844	42	90	84
Macon	405.6	0.1833	3.05	93,788	89,689	45,907	51	34,178	38	79	103
Madison	526.7	0.2377	2.78	250,580	193,329	67,906	35	114,272	59	132	84
Mankato	106.5	0.0479	2.89	42,307	34,019	10,086	30	21,871	64	95	87
Marquette	154.0	0.0695	2.87	51,639	36,290	12,543	35	21,606	60	78	92
McAllen - Brownsville	474.9	0.2144	3.63	115,011	102,543	50,770	50	37,318	36	65	87
Medford	289.5	0.1308	2.62	103,129	89,496	30,214	34	55,952	63	90	84
Memphis	1,689.8	0.7625	3.03	353,841	331,610	150,074	45	141,582	43	69	126
Meridian	199.0	0.0898	2.96	36,086	34,874	18,692	54	13,107	38	56	117
Miami	2,471.8	1.1154	2.57	1,273,706	1,180,310	337,866	29	706,852	60	128	89
Miles City - Glendive	30.7	0.0138	2.90	13,896	10,181	3,416	34	6,384	63	99	100
Milwaukee	1,908.2	0.8611	2.88	780,020	613,326	197,492	32	365,889	60	100	101
Minneapolis - St. Paul	2,950.9	1.3315	2.92	1,107,267	925,760	308,349	33	549,578	59	117	103
Minot - Bismarck - Dickinson	386.7	0.1745	3.05	116,944	80,758	24,790	31	50,761	63	85	125
Missoula - Butte	306.7	0.1386	2.76	126,833	91,152	30,493	33	56,699	62	98	93
Mobile - Pensacola	1,098.7	0.4957	3.06	286,475	261,539	124,356	48	105,209	40	85	100
Monroe - El Dorado	502.2	0.2265	3.03	79,994	72,581	31,022	43	27,806	38	53	141
Montgomery	464.0	0.2092	2.97	109,679	105,674	51,089	48	36,595	35	85	107
Nashville	1,725.4	0.7787	2.85	460,600	438,700	181,069	41	213,485	49	87	104
New Orleans	1,627.5	0.7345	3.02	588,434	512,648	199,953	39	225,938	44	87	100
New York	18,158.6	8.1950	2.76	5,878,683	5,175,254	1,485,594	29	2,854,179	55	95	124
Norfolk - Portsmouth - Newport News - Hampton	1,430.7	0.6459	3.10	432,787	416,495	193,219	46	178,634	43	107	91
North Platte	49.1	0.0224	2.70	18,422	16,370	5,902	36	9,462	58	122	86
Odessa - Midland	328.3	0.1481	2.95	128,193	117,278	53,717	46	49,578	42	89	80
Oklahoma City	1,374.5	0.6203	2.64	455,076	430,023	204,460	48	167,441	39	101	91
Omaha	934.1	0.4220	2.85	339,663	271,419	102,319	38	146,959	54	101	106
Orlando - Daytona Beach	1,339.3	0.6044	2.69	604,680	561,741	217,407	39	289,701	52	111	94
Ottumwa - Kirksville	75.3	0.0338	2.61	16,632	13,797	5,809	42	7,225	52	69	127
Paducah - Cape Girardeau - Harrisburg	791.2	0.3567	2.67	196,969	176,281	80,563	46	82,931	47	77	104
Palm Springs	639.9	0.2888	2.62	244,754	229,390	76,594	33	135,941	59	108	82
Panama City	215.9	0.0972	2.86	65,583	60,275	21,705	36	33,350	55	93	83
Parkersburg	92.8	0.0419	2.86	27,436	25,565	11,794	46	10,776	42	82	103
Peoria	650.4	0.2937	2.81	239,158	200,684	85,827	43	96,290	48	101	103
Philadelphia	6,850.7	3.0915	2.87	2,274,913	1,911,628	659,744	35	999,958	52	95	122
Phoenix	1,716.9	0.7749	2.87	688,178	625,697	207,692	33	324,646	52	104	86
Pittsburgh	3,362.2	1.5175	2.83	952,033	773,226	266,030	34	406,293	53	79	124
Portland, Ore.	1,942.6	0.8765	2.70	859,210	745,505	252,872	34	442,608	59	141	81
Portland - Poland Spring	835.1	0.3770	2.85	263,591	251,802	90,346	36	141,541	56	90	102
Presque Isle	98.1	0.0443	3.26	16,027	14,817	5,459	37	8,197	55	61	131
Providence	1,658.5	0.7485	2.86	480,812	424,445	138,642	33	234,830	55	95	107
Quincy - Hannibal	326.6	0.1474	2.70	86,386	67,974	29,273	43	33,691	50	78	119
Raleigh - Durham	1,504.6	0.6790	3.01	386,597	373,478	174,248	47	158,041	42	91	103
Rapid City	228.4	0.1027	2.87	94,508	74,799	22,430	30	47,730	64	107	83
Reno	300.3	0.1355	2.63	139,750	122,000	42,170	35	72,864	60	129	288

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ADI Name	12/31/79 Population (Thous.)	% Of U.S.	Average House-hold Size	1979 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Richmond	1,086.5	0.4908	2.89	314,625	306,068	135,240	44	126,697	41	94	102
Roanoke - Lynchburg	1,008.4	0.4547	2.85	228,697	224,587	101,470	45	94,135	42	71	111
Rochester, N.Y.	928.2	0.4190	2.77	304,643	267,337	81,371	30	147,405	55	89	107
Rochester - Mason City - Austin	397.0	0.1791	2.83	122,675	103,283	35,357	34	61,732	60	100	122
Rockford	496.0	0.2237	2.81	180,432	152,766	51,065	33	89,427	59	99	96
Roswell	156.4	0.0706	2.87	41,114	36,501	14,880	41	18,340	50	82	116
Sacramento - Stockton	2,107.9	0.9510	2.73	852,902	771,536	284,249	37	439,325	57	103	76
St. Joseph	137.6	0.0621	2.63	41,164	36,020	15,101	42	17,012	47	89	102
St. Louis	2,941.4	1.3280	2.90	1,026,626	902,265	391,422	43	398,457	44	95	100
Salinas - Monterey	487.6	0.2202	2.99	207,052	191,179	56,866	30	123,732	65	120	77
Salisbury	199.1	0.0898	2.72	95,088	86,633	34,307	40	43,819	51	98	69
Salt Lake City	1,508.1	0.6806	3.25	395,276	365,681	150,565	41	197,598	54	95	120
San Angelo	86.7	0.0392	2.68	32,770	29,341	13,177	45	12,154	41	91	82
San Antonio	1,369.0	0.6179	3.13	424,042	380,328	160,135	42	165,798	44	92	94
San Diego	1,841.2	0.8309	2.61	718,601	653,941	250,526	38	373,503	57	126	91
San Francisco	4,961.3	2.2390	2.54	2,315,536	2,095,770	667,705	32	1,242,819	59	121	93
Santa Barbara - Santa Maria - San Luis Obispo	449.7	0.2030	2.73	229,437	216,271	63,900	30	143,371	66	151	71
Savannah	487.4	0.2199	3.17	137,627	125,931	64,234	51	48,997	39	95	105
Seattle - Tacoma	2,661.8	1.2015	2.69	1,245,087	1,118,022	332,190	30	697,155	62	131	77
Selma, Alabama	54.8	0.0247	3.04	8,805	8,413	4,513	54	3,080	37	53	135
Shreveport - Texarkana	1,111.4	0.5018	2.87	269,972	252,701	115,356	46	101,106	40	71	103
Sioux City	437.6	0.1974	2.84	137,701	105,105	40,245	38	57,877	55	87	111
Sioux Falls - Mitchell	609.6	0.2754	2.87	197,497	155,449	46,117	30	99,635	64	101	103
South Bend - Elkhart	758.3	0.3420	2.90	264,816	225,862	88,073	39	115,789	51	102	92
Spokane	866.1	0.3905	2.77	287,487	234,673	84,476	36	138,140	59	91	101
Springfield, Mass.	653.2	0.2948	2.86	193,842	166,918	50,295	30	84,572	51	77	114
Springfield, Mo.	680.7	0.3070	2.69	173,523	161,164	72,498	45	72,496	45	89	94
Springfield - Decatur - Champaign	772.9	0.3487	2.73	296,914	249,624	98,295	39	124,813	50	103	97
Syracuse	931.0	0.4201	2.92	297,802	257,449	76,001	30	139,276	54	81	104
Tallahassee	415.5	0.1878	3.02	112,562	107,438	45,545	42	52,057	48	82	89
Tampa - St. Petersburg	2,230.5	1.0066	2.41	928,221	856,019	305,915	36	447,793	52	97	83
Terre Haute	452.1	0.2041	2.71	124,634	104,671	46,498	44	47,787	46	84	106
Toledo	1,165.6	0.5261	2.84	418,531	364,270	141,207	39	183,089	50	98	91
Topeka	326.1	0.1466	2.69	100,807	91,407	43,418	47	40,456	44	105	105
Traverse City - Cadillac	388.0	0.1749	2.84	164,114	125,668	43,745	35	74,804	60	90	84
Tucson	590.6	0.2665	2.85	197,477	176,290	65,380	37	91,021	52	88	99
Tulsa	1,042.2	0.4705	2.62	291,624	276,948	126,132	46	112,247	41	83	105
Tuscaloosa	131.8	0.0595	3.21	37,394	36,119	17,739	49	13,410	37	107	80
Twin Falls	80.4	0.0363	2.74	22,829	20,117	7,742	38	11,389	57	98	97
Tyler	235.1	0.1060	2.80	62,272	60,712	27,662	46	25,690	42	65	102
Utica	379.2	0.1712	2.78	121,836	101,651	36,509	36	49,800	49	85	94
Victoria	64.9	0.0293	3.14	27,097	23,224	11,117	48	10,333	44	92	71
Waco - Temple	568.9	0.2567	2.90	170,447	157,786	71,283	45	65,585	42	96	85
Washington, D.C.	3,972.9	1.7931	2.83	1,520,416	1,447,958	535,177	37	674,238	47	120	104
Watertown - Carthage	233.4	0.1054	2.98	59,416	45,932	14,141	31	26,516	58	68	117
Wausau - Rhinelander	426.2	0.1923	2.98	145,772	100,102	28,252	28	66,177	66	80	110
West Palm Beach	713.8	0.3223	2.59	318,947	286,825	83,807	29	181,951	63	96	87
Wheeling - Steubenville	451.0	0.2032	2.82	123,407	99,487	43,092	43	45,596	46	73	113
Wichita - Hutchinson	1,081.6	0.4884	2.71	378,602	350,298	165,936	47	152,664	44	110	92
Wichita Falls - Lawton	456.0	0.2057	2.78	104,826	97,511	44,926	46	40,629	42	75	106
Wilkes-Barre - Scranton	1,305.4	0.5892	2.79	318,914	265,131	94,053	35	135,088	51	70	131
Wilmington	428.0	0.1932	2.98	134,757	129,326	61,979	48	55,497	43	106	99
Yakima	426.0	0.1924	2.83	162,776	138,838	43,731	31	86,303	62	99	90
Youngstown	673.5	0.3040	3.06	200,989	169,828	71,806	42	82,134	48	82	103
Zanesville	82.5	0.0373	2.84	21,393	16,938	7,057	42	8,168	48	67	117
Total ADIs	220,476.2	99.5007	2.83	76,046,724	67,734,139	25,457,493	38	34,589,361	51	100	100

Top 100 Fast Food Markets - 1979

By metro area

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	951,686	1
Chicago	918,128	2
New York	761,966	3
Detroit	548,344	4
Dallas - Fort Worth	511,937	5
Houston	500,378	6
Washington	441,180	7
San Francisco - Oakland	432,242	8
Philadelphia	431,838	9
Boston - Lowell - Brockton - Lawrence - Haverhill	373,933	10
Atlanta	353,655	11
St. Louis	341,714	12
Anaheim - Santa Ana - Garden Grove	301,536	13
Baltimore	290,604	14
Minneapolis - St. Paul	252,251	15
San Diego	250,526	16
Kansas City	232,956	17
Nassau - Suffolk	226,438	18
Cleveland	223,886	19
Seattle - Everett	214,550	20
Cincinnati	211,481	21
Tampa - St. Petersburg	204,051	22
Riverside - San Bernardino - Ontario	200,600	23
Denver - Boulder	197,736	24
Pittsburgh	189,514	25
Phoenix	184,656	26
Indianapolis	183,610	27
Miami	180,861	28
San Jose	180,828	29
Columbus, Ohio	180,004	30
Portland, Ore	168,295	31
Louisville	159,492	32
Milwaukee	159,112	33
Newark, N.J.	155,515	34
New Orleans	154,361	35
Oklahoma City	148,105	36
Fort Lauderdale - Hollywood	142,764	37
Sacramento	142,113	38
Honolulu	140,821	39
San Antonio	133,193	40
Buffalo	125,907	41
Norfolk - Virginia Beach - Portsmouth	121,920	42
Dayton	121,609	43
Orlando	114,804	44
Hartford - New Britain - Bristol	110,785	45
Nashville-Davidson	110,549	46
Jacksonville	110,539	47
Birmingham	107,290	48
Greensboro - Winston-Salem - High Point	107,182	49
Memphis	104,384	50
Toledo	99,152	51
Salt Lake City - Ogden	98,938	52
Richmond	97,669	53
Austin	94,692	54
Charlotte - Gastonia	90,765	55
Akron	90,560	56
Gary - Hammond - East Chicago	90,248	57
Tulsa	87,026	58
Wichita	86,676	59
Greenville - Spartanburg	84,227	60
Rochester, N.Y.	82,737	61
New Haven - West Haven - Waterbury - Meriden	77,768	62
Omaha	76,495	63
Raleigh - Durham	76,213	64
Albany - Schenectady - Troy	72,183	65
Fresno	64,941	66
Knoxville	64,626	67
Allentown - Bethlehem - Easton	64,524	68
Lansing - East Lansing	62,670	69
New Brunswick - Perth Amboy - Sayreville	62,249	70
Providence - Warwick - Pawtucket	62,163	71
Albuquerque	62,092	72
Youngstown - Warren	61,184	73
Flint	60,612	74
Grand Rapids	60,175	75
Oxnard - Simi Valley - Ventura	59,949	76
Las Vegas	59,092	77
Tucson	58,669	78
Little Rock - North Little Rock	58,431	79
Bridgeport - Stamford - Norwalk - Danbury	58,364	80
Baton Rouge	58,106	81
Harrisburg	57,793	82
Lexington-Fayette	57,745	83
Beaumont - Port Arthur - Orange	57,336	84
West Palm Beach - Boca Raton	56,445	85
Davenport - Rock Island - Moline	56,218	86
Syracuse	56,063	87
Wilmington, Del.	55,773	88
Columbia, S.C.	54,878	89
Northeast Pennsylvania	54,217	90
Peoria	53,705	91
Mobile	53,034	92
Fort Wayne	52,672	93
Johnson City - Kingsport - Bristol	52,576	94
Madison	52,499	95
Jackson, Miss.	52,199	96
Charleston - North Charleston, S.C.	51,616	97
Canton	50,784	98
Des Moines	50,494	99
Long Branch - Asbury Park	50,236	100

By ADI

ADI Name	Sales ($000)	Ranking
New York	1,485,594	1
Los Angeles	1,440,599	2
Chicago	1,086,370	3
San Francisco	667,705	4
Philadelphia	659,744	5
Detroit	596,456	6
Dallas - Ft. Worth	565,727	7
Houston	559,524	8
Washington, D.C.	535,177	9
Boston	505,049	10
Atlanta	461,746	11
Cleveland	454,271	12
St. Louis	391,422	13
Miami	337,866	14
Seattle - Tacoma	332,190	15
Baltimore	310,405	16
Minneapolis - St. Paul	308,349	17
Tampa - St. Petersburg	305,915	18
Indianapolis	305,528	19
Sacramento - Stockton	284,249	20
Kansas City	280,208	21
Cincinnati	268,733	22
Pittsburgh	266,030	23
Denver	266,020	24
Portland, Ore.	252,872	25
San Diego	250,526	26
Columbus, Ohio	231,366	27
Orlando - Daytona Beach	217,407	28
Phoenix	207,692	29
Louisville	205,625	30
Oklahoma City	204,460	31
New Orleans	199,953	32
Charlotte	197,956	33
Hartford - New Haven	197,842	34
Milwaukee	197,492	35
Norfolk - Portsmouth - Newport News - Hampton	193,219	36
Nashville	181,069	37
Raleigh - Durham	174,248	38
Greenville - Spartanburg - Asheville	173,069	39
Wichita - Hutchinson	165,936	40
Dayton	164,631	41
San Antonio	160,135	42
Buffalo	158,468	43
Grand Rapids - Kalamazoo - Battle Creek	154,246	44
Salt Lake City	150,565	45
Memphis	150,074	46
Greensboro - Winston-Salem - High Point	143,724	47
Jacksonville	141,225	48
Toledo	141,207	49
Birmingham	140,885	50
Harrisburg - York - Lancaster - Lebanon	139,432	51
Providence	138,642	52
Richmond	135,240	53
Flint - Saginaw - Bay City	134,150	54
Tulsa	126,132	55
Mobile - Pensacola	124,356	56
Charleston - Huntington	123,460	57
Knoxville	122,026	58
Little Rock	121,703	59
Shreveport - Texarkana	115,356	60
Albuquerque	111,727	61
Albany - Schenectady - Troy	109,703	62
Davenport - Rock Island - Moline	107,109	63
Austin, Tex.	106,311	64
Des Moines	105,430	65
Fresno	105,015	66
Omaha	102,319	67
Roanoke - Lynchburg	101,470	68
Springfield - Decatur - Champaign	98,295	69
Lexington	96,797	70
Wilkes-Barre - Scranton	94,053	71
Portland - Poland Spring	90,346	72
Jackson, Miss.	88,354	73
South Bend - Elkhart	88,073	74
Peoria	85,827	75
Spokane	84,476	76
West Palm Beach	83,807	77
Green Bay	83,721	78
Rochester, N.Y.	81,371	79
Paducah - Cape Girardeau - Harrisburg	80,563	80
Chattanooga	80,171	81
Cedar Rapids - Waterloo	79,694	82
Palm Springs	76,594	83
Syracuse	76,001	84
Columbia, S.C.	75,582	85
Lansing	75,295	86
Evansville	74,921	87
Ft. Wayne	74,364	88
Springfield, Mo.	72,498	89
Youngstown	71,806	90
Waco - Temple	71,283	91
Baton Rouge	70,964	92
Huntsville - Decatur - Florence	69,915	93
Bristol - Kingsport - Johnson City	69,879	94
Amarillo	68,319	95
Madison	67,906	96
Tucson	65,380	97
Lincoln - Hastings - Kearney	65,374	98
Johnstown - Altoona	64,834	99
El Paso	64,637	100

Top 100 Restaurant Markets - 1979

By metro area

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	1,674,958	1
New York	1,560,576	2
Chicago	1,398,773	3
San Francisco - Oakland	875,498	4
Detroit	766,669	5
Boston - Lowell - Brockton - Lawrence - Haverhill	730,161	6
Philadelphia	651,295	7
Washington	575,040	8
Anaheim - Santa Ana - Garden Grove	523,133	9
Seattle - Everett	471,507	10
Dallas - Fort Worth	470,077	11
Houston	469,526	12
Minneapolis - St. Paul	426,288	13
Nassau - Suffolk	395,731	14
San Diego	373,503	15
Miami	356,101	16
Denver - Boulder	355,648	17
St. Louis	343,227	18
Cleveland	331,537	19
Fort Lauderdale - Hollywood	330,326	20
Pittsburgh	310,731	21
Atlanta	291,551	22
Tampa - St. Petersburg	289,221	23
Portland, Ore	287,905	24
Newark, N.J.	282,919	25
Milwaukee	282,622	26
Phoenix	278,639	27
San Jose	266,798	28
Baltimore	262,154	29
Riverside - San Bernardino - Ontario	251,838	30
Cincinnati	236,860	31
Kansas City	227,967	32
Sacramento	221,116	33
Honolulu	215,540	34
Buffalo	204,413	35
New Orleans	189,068	36
Columbus, Ohio	186,415	37
Rochester, N.Y.	149,780	38
Hartford - New Britain - Bristol	148,348	39
Nashville-Davidson	145,210	40
Indianapolis	144,553	41
West Palm Beach - Boca Raton	142,754	42
San Antonio	140,886	43
Orlando	136,487	44
Albany - Schenectady - Troy	134,815	45
Toledo	133,558	46
Bridgeport - Stamford - Norwalk - Danbury	130,171	47
Grand Rapids	124,896	48
Louisville	124,433	49
Providence - Warwick - Pawtucket	121,424	50
Dayton	120,137	51
Akron	117,116	52
Oklahoma City	115,265	53
New Haven - West Haven - Waterbury - Meriden	113,244	54
Salt Lake City - Ogden	110,001	55
Omaha	108,724	56
Las Vegas	102,175	57
Syracuse	101,787	58
Memphis	101,296	59
Santa Barbara - Santa Maria - Lompoc	101,268	60
Gary - Hammond - East Chicago	97,580	61
Long Branch - Asbury Park	96,402	62
Austin	95,850	63
Jacksonville	94,387	64
Birmingham	94,221	65
Greensboro - Winston-Salem - High Point	94,152	66
Norfolk - Virginia Beach - Portsmouth	93,172	67
Richmond	92,541	68
Oxnard - Simi Valley - Ventura	84,215	69
Fresno	84,135	70
Fort Wayne	80,897	71
Worcester - Fitchburg - Leominster	80,473	72
Allentown - Bethlehem - Easton	78,481	73
Tucson	78,344	74
Northeast Pennsylvania	78,228	75
Madison	78,186	76
Salinas - Seaside - Monterey	77,552	77
Charlotte - Gastonia	77,093	78
Springfield - Chicopee - Holyoke	76,560	79
Raleigh - Durham	76,139	80
Flint	75,951	81
Tulsa	75,402	82
Tacoma	74,222	83
Bakersfield	72,622	84
Albuquerque	72,461	85
Wilmington, Del.	70,452	86
Lansing - East Lansing	69,149	87
Wichita	68,335	88
Youngstown - Warren	67,260	89
Davenport - Rock Island - Moline	67,081	90
Harrisburg	67,050	91
New Brunswick - Perth Amboy - Sayreville	66,914	92
Sarasota	66,143	93
Daytona Beach	66,050	94
Newport News - Hampton	65,827	95
Paterson - Clifton - Passaic	65,756	96
Canton	65,481	97
Greenville - Spartanburg	64,265	98
Vallejo - Fairfield - Napa	64,094	99
New Bedford - Fall River	61,950	100

By ADI

ADI Name	Sales ($000)	Ranking
New York	2,854,179	1
Los Angeles	2,404,366	2
Chicago	1,592,606	3
San Francisco	1,242,819	4
Boston	1,001,545	5
Philadelphia	999,958	6
Detroit	836,927	7
Miami	706,852	8
Seattle - Tacoma	697,155	9
Washington, D.C.	674,238	10
Cleveland	613,719	11
Minneapolis - St. Paul	549,576	12
Houston	523,778	13
Dallas - Ft. Worth	520,219	14
Denver	495,464	15
Tampa - St. Petersburg	447,793	16
Portland, Ore.	442,608	17
Sacramento - Stockton	439,325	18
Pittsburgh	406,293	19
St. Louis	398,457	20
San Diego	373,503	21
Milwaukee	365,889	22
Atlanta	360,984	23
Phoenix	324,646	24
Baltimore	289,866	25
Orlando - Daytona Beach	289,701	26
Kansas City	278,325	27
Hartford - New Haven	277,402	28
Cincinnati	277,233	29
Indianapolis	268,451	30
Buffalo	264,004	31
Grand Rapids - Kalamazoo - Battle Creek	262,924	32
Columbus, Ohio	245,729	33
Providence	234,830	34
New Orleans	225,938	35
Nashville	213,485	36
Albany - Schenectady - Troy	202,245	37
Salt Lake City	197,598	38
Flint - Saginaw - Bay City	189,043	39
Toledo	183,089	40
West Palm Beach	181,951	41
Norfolk - Portsmouth - Newport News - Hampton	178,634	42
Harrisburg - York - Lancaster - Lebanon	176,125	43
Dayton	169,253	44
Charlotte	168,019	45
Oklahoma City	167,441	46
Louisville	165,850	47
San Antonio	165,798	48
Green Bay	165,535	49
Raleigh - Durham	158,041	50
Fresno	156,307	51
Wichita - Hutchinson	152,664	52
Rochester, N.Y.	147,405	53
Omaha	146,959	54
Albuquerque	144,606	55
Santa Barbara - Santa Maria - San Luis Obispo	143,371	56
Memphis	141,582	57
Portland - Poland Spring	141,541	58
Greenville - Spartanburg - Asheville	141,130	59
Syracuse	139,276	60
Spokane	138,140	61
Palm Springs	135,941	62
Des Moines	135,117	63
Wilkes-Barre - Scranton	135,088	64
Davenport - Rock Island - Moline	128,638	65
Richmond	126,697	66
Greensboro - Winston-Salem - High Point	124,898	67
Springfield - Decatur - Champaign	124,813	68
Salinas - Monterey	123,732	69
Jacksonville	121,093	70
Birmingham	117,972	71
South Bend - Elkhart	115,789	72
Madison	114,272	73
Cedar Rapids - Waterloo	112,653	74
Tulsa	112,247	75
Austin, Tex.	106,645	76
Charleston - Huntington	106,071	77
Knoxville	105,868	78
Mobile - Pensacola	105,209	79
Ft. Wayne	105,010	80
Las Vegas	102,739	81
Little Rock	101,907	82
Shreveport - Texarkana	101,106	83
Sioux Falls - Mitchell	99,635	84
Fargo	98,723	85
Lincoln - Hastings - Kearney	97,112	86
Peoria	96,290	87
Roanoke - Lynchburg	94,135	88
Tucson	91,021	89
Rockford	89,427	90
Lansing	88,998	91
Yakima	86,303	92
Burlington - Plattsburgh	85,226	93
Springfield, Mass.	84,572	94
Paducah - Cape Girardeau - Harrisburg	82,931	95
Youngstown	82,134	96
Colorado Springs - Pueblo	78,476	97
Johnstown - Altoona	78,387	98
Eugene	77,642	99
Duluth - Superior	76,800	100

Top 100 RAI Markets - 1979

By metro area

Metro Area Name	RAI	Ranking
Honolulu	212	1
Ann Arbor	185	2
Santa Fe	168	3
Panama City	165	4
Santa Barbara - Santa Maria - Lompoc	163	5
Bryan - College Station	160	6
La Crosse	157	7
Grand Rapids	155	8
Madison	155	8
Columbia, Mo	154	10
Portland, Ore	154	10
Champaign - Urbana - Rantoul	152	12
Sioux Falls	148	13
Wichita	148	13
Seattle - Everett	146	15
Fargo - Moorhead	145	16
Daytona Beach	142	17
Dallas - Fort Worth	140	18
Salem	139	19
Hattiesburg	138	20
Lafayette - West Lafayette	138	20
Lincoln	138	20
Boise	137	23
Fort Wayne	137	23
Salinas - Seaside - Monterey	137	23
Reno	136	26
Sarasota	136	26
Fort Lauderdale - Hollywood	135	28
Albuquerque	133	29
Anaheim - Santa Ana - Garden Grove	133	29
Atlanta	132	31
Newport News - Hampton	132	31
Cheyenne	131	33
Chicago	131	33
Rapid City	131	33
Eau Claire	130	36
Washington	130	36
Fort Collins	129	38
Kansas City	129	38
Austin	128	40
Grand Forks	128	40
San Francisco - Oakland	128	40
Springfield, Mo	128	40
Anchorage	127	44
Bloomington - Normal	127	44
St. Cloud	127	44
Battle Creek	126	47
Rochester, Minn	126	47
San Diego	126	47
Gainesville	125	50
Kankakee	125	50
Iowa City	124	52
Kalamazoo - Portage	124	52
Denver - Boulder	123	54
Minneapolis - St. Paul	123	54
South Bend	123	54
Columbus, Ohio	122	57
Miami	122	57
Montgomery	122	57
Omaha	122	57
Jackson, Mich	121	61
Jamestown	121	61
Los Angeles - Long Beach	120	63
Saginaw	120	63
Amarillo	119	65
Bloomington, Ind	119	65
Burlington, Vt	119	65
Davenport - Rock Island - Moline	119	65
Atlantic City	118	69
Enid	118	69
Lansing - East Lansing	118	69
Boston - Lowell - Brockton - Lawrence - Haverhill	117	72
Evansville	116	73
Oklahoma City	116	73
Lubbock	115	75
Melbourne - Titusville - Cocoa	115	75
Raleigh - Durham	115	75
San Jose	115	75
Athens	114	79
Colorado Springs	114	79
Jackson, Miss	114	79
Louisville	114	79
Orlando	114	79
Spokane	114	79
Lawrence, Kans	113	85
Missoula	113	85
Nashville-Davidson	113	85
Phoenix	113	85
Richmond	113	85
Savannah	113	85
Tallahassee	113	85
Kokomo	112	92
Las Vegas	112	92
Tacoma	112	92
Greensboro - Winston-Salem - High Point	111	95
Indianapolis	111	95
New York	111	95
Norfolk - Virginia Beach - Portsmouth	111	95
Odessa	111	95
Cincinnati	110	100
Columbus, Ga	110	100
Eugene - Springfield	110	100
Rockford	110	100

By ADI

ADI Name	RAI	Ranking
Flagstaff	162	1
Santa Barbara - Santa Maria - San Luis Obispo	151	2
Portland, Ore	141	3
Lafayette, Ind	138	4
Madison	132	5
Seattle - Tacoma	131	6
Reno	129	7
Miami	128	8
Chicago	126	9
San Diego	126	9
Dallas - Ft. Worth	125	11
Lansing	124	12
Denver	123	13
North Platte	122	14
Grand Rapids - Kalamazoo - Battle Creek	121	15
Los Angeles	121	15
San Francisco	121	15
Salinas - Monterey	120	18
Washington, D.C.	120	18
Kansas City	118	20
Austin, Tex.	117	21
Minneapolis - St. Paul	117	21
Anchorage	115	23
Ft. Wayne	115	23
Lima	115	23
Atlanta	113	26
Albuquerque	112	27
Fargo	112	27
Las Vegas	112	27
Biloxi - Gulfport - Pascagoula	111	30
Boston	111	30
Orlando - Daytona Beach	111	30
Columbus, Ohio	110	33
Gainesville	110	33
La Crosse - Eau Claire	110	33
Wichita - Hutchinson	110	33
Dubuque	109	37
Lincoln - Hastings - Kearney	108	38
Omaha	108	38
Palm Springs	108	38
Norfolk - Portsmouth - Newport News - Hampton	107	41
Rapid City	107	41
Tuscaloosa	107	41
Boise	106	44
Eugene	106	44
Wilmington	106	44
Topeka	105	47
Davenport - Rock Island - Moline	104	48
Indianapolis	104	48
Phoenix	104	48
Detroit	103	51
Sacramento - Stockton	103	51
Springfield - Decatur - Champaign	103	51
Hartford - New Haven	102	54
South Bend - Elkhart	102	54
Cedar Rapids - Waterloo	101	56
Houston	101	56
Oklahoma City	101	56
Peoria	101	56
Sioux Falls - Mitchell	101	56
Billings	100	61
Colorado Springs - Pueblo	100	61
Milwaukee	100	61
Rochester - Mason City - Austin	100	61
Cincinnati	99	65
Columbia - Jefferson City	99	65
Miles City - Glendive	99	65
Rockford	99	65
Yakima	99	65
Charlottesville	98	70
Dayton	98	70
El Paso	98	70
Louisville	98	70
Missoula - Butte	98	70
Salisbury	98	70
Toledo	98	70
Twin Falls	98	70
Cheyenne	97	78
Grand Junction	97	78
Green Bay	97	78
Greensboro - Winston-Salem - High Point	97	78
Tampa - St. Petersburg	97	78
Helena	96	83
Waco - Temple	96	83
West Palm Beach	96	83
Baltimore	95	86
Mankato	95	86
New York	95	86
Philadelphia	95	86
Providence	95	86
St. Louis	95	86
Salt Lake City	95	86
Savannah	95	86
Erie	94	94
Richmond	94	94
Amarillo	93	96
Bend	93	96
Jacksonville	93	96
Joplin - Pittsburg	93	96
Panama City	93	96

Top 100 RGI Markets - 1979

By metro area

Metro Area Name	RGI	Ranking
Las Vegas	449	1
Reno	232	2
Atlantic City	204	3
Jersey City	159	4
Johnstown	158	5
Williamsport	147	6
Trenton	144	7
Rochester, Minn	140	8
New York	135	9
Pittsfield	135	9
Steubenville - Weirton	132	11
Lorain - Elyria	130	12
Wausau	127	13
Alexandria, La	126	14
Cheyenne	124	15
Philadelphia	124	15
Northeast Pennsylvania	123	17
Sheboygan	123	17
Erie	122	19
Newark, N J	122	19
Pittsburgh	122	19
Provo - Orem	122	19
Springfield, Ohio	121	23
Bridgeport - Stamford - Norwalk - Danbury	120	24
Lancaster	120	24
Providence - Warwick - Pawtucket	120	24
Salt Lake City - Ogden	120	24
Elmira	119	28
Memphis	119	28
Hartford - New Britain - Bristol	117	30
Quincy, Ill	117	30
Huntington - Ashland	116	32
Pascagoula - Moss Point	116	32
Bangor	114	34
Springfield - Chicopee - Holyoke	114	34
Baton Rouge	113	36
Chattanooga	113	36
Danville, Va	113	36
Des Moines	113	36
Harrisburg	113	36
New London - Norwich	113	36
Pine Bluff	113	36
Vineland - Millville - Bridgeton	113	36
Wilmington, Del	113	36
Marion	112	45
Monroe	112	45
Poughkeepsie	112	45
Springfield, Ill	112	45
Worcester - Fitchburg - Leominster	112	45
Paterson - Clifton - Passaic	111	50
Reading	111	50
Sioux City	111	50
Manitowoc - Two Rivers	110	53
Racine	110	53
Decatur	109	55
Kenosha	109	55
Lynchburg	109	55
York	109	55
Burlington, Vt	108	59
Charlotte - Gastonia	108	59
Danville, Ill	108	59
Kannapolis - Concord - Salisbury	108	59
Little Rock - North Little Rock	108	59
New Haven - West Haven - Waterbury - Meriden	108	59
Orlando	108	59
Rochester, N Y	106	59
Duluth - Superior	107	67
Miami	107	67
Altoona	106	69
Anderson, S C	106	69
Hagerstown	106	69
New Brunswick - Perth Amboy - Sayreville	106	69
New Orleans	106	69
Petersburg - Colonial Heights - Hopewell	106	69
Topeka	106	69
Tulsa	106	69
Birmingham	105	77
Boston - Lowell - Brockton - Lawrence - Haverhill	105	77
Bremerton	105	77
Jackson, Mich	105	77
Knoxville	105	77
Portland, Me	105	77
Washington	105	77
Allentown - Bethlehem - Easton	104	84
Asheville	104	84
Cleveland	104	84
Manchester - Nashua	104	84
Midland	104	84
Minneapolis - St Paul	104	84
Albany, Ga	103	90
Newark, Ohio	103	90
Newburgh - Middletown	103	90
Parkersburg - Marietta	103	90
Pueblo	103	90
Spokane	103	90
Charleston, W Va	102	96
Colorado Springs	102	96
Jacksonville	102	96
Lawton	102	96
Mobile	102	96
Nassau - Suffolk	102	96
Syracuse	102	96

By ADI

ADI Name	RGI	Ranking
Las Vegas	447	1
Reno	288	2
Bluefield - Beckley - Oak Hill	145	3
Greenwood - Greenville	143	4
Monroe - El Dorado	141	5
Alexandria, La	138	6
Florence, S C	138	6
Selma, Alabama	135	8
Presque Isle	131	9
Wilkes-Barre - Scranton	131	9
Clarksburg - Weston	127	11
Ottumwa - Kirksville	127	11
Memphis	126	13
Minot - Bismarck - Dickinson	125	14
Burlington - Plattsburgh	124	15
Erie	124	15
Jonesboro	124	15
New York	124	15
Pittsburgh	124	15
Charleston - Huntington	123	20
Johnstown - Altoona	122	21
Philadelphia	122	21
Rochester - Mason City - Austin	122	21
Elmira	121	24
Salt Lake City	120	25
Albany, Ga	119	26
Quincy - Hannibal	119	26
Ardmore - Ada	118	28
Little Rock	117	29
Meridian	117	29
Watertown - Carthage	117	29
Zanesville	117	29
Roswell	116	33
Bangor	115	34
Binghamton	115	34
Harrisburg - York - Lancaster - Lebanon	115	34
Hartford - New Haven	115	34
Idaho Falls - Pocatello	115	34
Springfield, Mass	114	39
Bristol - Kingsport - Johnson City	113	40
Cheyenne	113	40
Columbus - Tupelo, Miss	113	40
Dothan	113	40
Wheeling - Steubenville	113	40
Baton Rouge	112	45
Des Moines	112	45
Chattanooga	111	47
Great Falls	111	47
Roanoke - Lynchburg	111	47
Sioux City	111	47
Birmingham	110	51
Wausau - Rhinelander	110	51
Evansville	109	53
Farmington	109	53
Duluth - Superior	108	55
Lincoln - Hastings - Kearney	108	55
Casper - Riverton	107	57
Jackson, Miss	107	57
Montgomery	107	57
Providence	107	57
Rochester, N Y	107	57
Lafayette, La	106	62
Omaha	106	62
Terre Haute	106	62
Wichita Falls - Lawton	106	62
Charlotte	105	66
Columbia, S C	105	66
Harrisonburg	105	66
Huntsville - Decatur - Florence	105	66
Savannah	105	66
Topeka	105	66
Tulsa	105	66
Albany - Schenectady - Troy	104	73
Augusta	104	73
Greenville - Spartanburg - Asheville	104	73
Knoxville	104	73
Nashville	104	73
Paducah - Cape Girardeau - Harrisburg	104	73
Syracuse	104	73
Washington, D C	104	73
Abilene - Sweetwater	103	81
Colorado Springs - Pueblo	103	81
Jacksonville	103	81
Macon	103	81
Minneapolis - St Paul	103	81
Parkersburg	103	81
Peoria	103	81
Raleigh - Durham	103	81
Shreveport - Texarkana	103	81
Sioux Falls - Mitchell	103	81
Youngstown	103	81
Alexandria, Minn	102	92
Boston	102	92
Lake Charles	102	92
Portland - Poland Spring	102	92
Richmond	102	92
St Joseph	102	92
Tyler	102	92
Milwaukee	101	99
Spokane	101	99